Twin Cities Metropolitan Area Summer Visitor Profile

Final Report

September 2012

Prepared for:

Metro Tourism Association

Prepared by:

Andrew Oftedal, M.S.
Ingrid Schneider, Ph.D.

Tourism Center
University of Minnesota

A collaboration of the
University of Minnesota Extension *and*
College of Food, Agricultural & Natural Resource Sciences

ACKNOWLEDGEMENTS

The authors gratefully acknowledge funding from the Metro Tourism Association and the detailed project work of a sub-committee including: Gayle Junnila, Jan Kroells, Steve Markuson, Heather Proskey, and Adam Johnson. Thank you to data collectors Cameron Swenson, Eliza Grimes, Emily Carr, Hannah Hutchins, Jesse Williams, John Briel, Lauren Allen, Mary Hammes, and Sam BeVier. Thank you to Ben Winchester, Sarah Thiede, and Samantha Bruno of the University of Minnesota Center for Small Towns for data entry. We appreciate Ryan Pesch of the University of Minnesota Extension Community Vitality for producing the visitor maps and Hung Tuan Tran for data checking. A special thanks to the many sites who opened up their organizations for our data collection efforts:

Adrienne Wiseman, Michael Rainville & Ryan French
Walker Art Center

Anthony Spears
Crowne Plaza Minneapolis Airport Hotel

Bill Von Bank & Josh Le
Minnesota Zoo

Bob Breck
Science Museum of Minnesota

Brandon Bolduc
Best Western Plus

Christopher Giaimo
Crowne Plaza Minneapolis West

Chuck Dougherty
Water Street Inn

Cindy Bornetun
Anoka County Parks

Cory Hinz
Bunker Beach Water Park

Dermot Cowley
Lola's Lakehouse

Emilee J. DeCoteau, Amy Martin & Martha Lopez
Burnsville Center

Ginger Cannon
Minneapolis Parks & Recreation Board

Hannah Kowalski
Mall of America

Heidi Olson
Country Inn & Suites

Jay Bhatka
Country Inn & Suites

Jennie Zafft
The Shoppes at Arbor Lakes

Jim Saccoman
Radisson Hotel Bloomington and Water Park of America

Jim Waldvogel
Hilton Minneapolis/Bloomington

Joanna Danks
Minnesota Historical Society

John Connelly
National Sports Center

Judy Brooks
Landmark Center

Liz Ostrander
Rosedale Center

Mary Pat Monson
Canterbury Park Racetrack and Card Club

Mary Tourville-Phillips
Best Western Plus

Meg Brownson
Alfresco Casual Living

Mike Landstad
The Shops at West End

Susan Summervold
Radisson Hotel Roseville

Robin Stinnett, Todd Larkin & Kim Hewelt
Valleyfair Amusement Park

Sam Thompson
metroConnections
Twin Cities Highlight Tour

Tim Anderson
Bunker Hills Golf Club

TABLE OF CONTENTS

FIGURES AND TABLES

INTRODUCTION

Consumer profile information is a requirement for effective tourism marketing and planning. In the Twin Cities Metropolitan area, comprehensive consumer information dates back to 2007 (Davidson-Peterson, 2008). Subsequently, the Metro Tourism Association collaborated to fund a profile of summer visitors to the Twin Cities area Summer 2012. This report details the methods and findings of that visitor profile which repeats several questions from the 2007 profile, but adds significantly to the understanding of consumer use of social media and 'eWord of Mouth' (eWOM; Bronner & de Hoog, 2011).

METHODOLOGY

On-site, in-person questionnaires were administered by trained staff to Twin Cities Metropolitan Area visitors the summer of 2012, specifically between June 22 and August 19, 2012.

Study Setting

The Twin Cities Metropolitan Area, with a 2011 population of 3.32 million residents, is the 16th largest metropolitan area in the United States (US Census Bureau, 2012). The Twin Cities Metropolitan Area hosts an international airport and is also a major drive market for the upper mid-west and parts of Canada.

The Twin Cities Metropolitan Area offers a wide range of activities and experiences. Culture-minded visitors can experience a diversity of museums, art galleries, and theaters. Shoppers can patron both small boutiques and the large mall shopping areas in addition to antique shops. For outdoor enthusiasts, the Mississippi River, St. Croix River, and numerous lakes offer multiple opportunities as do miles of trails. Sportspeople can find championship-level golf courses and cheer on collegiate, semi-professional, and professional teams in all major sports leagues. Further, families find a variety of opportunities across the Twin Cities Metropolitan Area.

Sampling

A convenience sample was designed to reach the breadth of summer tourists visiting the Twin Cities Metropolitan Area. Based on discussions with Metro Tourism Association representatives, sample sites were distributed across thirteen communities in the Twin Cities Metropolitan Area: Blaine, Bloomington, Burnsville, Coon Rapids, Eagan, Maple Grove, Minneapolis, Roseville, Shakopee, Saint Louis Park, Saint Paul, Stillwater, and

Waconia (Appendix A). Data collection occurred on Fridays, Saturdays, Sundays, and seven randomly selected weekdays throughout the summer (Appendix B).

Sampling quotas for each community were constructed based upon 2011 lodging tax receipts. For each participating community, local convention and visitor bureau leaders were consulted to provide specific sampling sites (e.g. community attractions, events, lodging, etc.). Site management was then contacted, asked to participate, and sampling times mutually agreed upon. Questionnaires were collected at a total of 34 sites throughout the Twin Cities Metropolitan Area (Appendix C).

All questionnaires were administered in person via trained University of Minnesota Tourism Center staff. A convenience sampling approach was implemented where University of Minnesota Tourism Center staff asked passing individuals to complete questionnaires, attempting to alternate by gender of person completing questionnaire.

Respondent approach and screening

A series of screening questions assured the individual was a tourist (**Figure 1**). For the purposes of this study, a tourist was anyone who stayed one to 30 nights or who was on a day trip in an area at least 50 miles from their primary residence. Only leisure-related travelers were included; business and medical travelers were excluded. Depending upon location, incentives included Mall of America Nickelodeon Universe Amusement Park tickets or Shoppes at Arbor Lakes coupon books.

Question 1: Are you a year-round, seasonal, or short-term resident of either this town or city or the immediate surrounding area?

Yes: Terminate — *No*: Continue

Question 2: Are you visiting this area for the day or have you/will you spend at least one night year?

Day visitor: Continue — *Overnight*: Give survey to respondent

Question 3: Have you travelled at least 50 miles from your primary residence to be here?

Yes: Give survey to respondent — *No*: Terminate

Figure 1 Screening questions for potential respondents to the 2012 Metropolitan Area Visitor Survey

Questionnaire

An on-site questionnaire was developed based on past research and with the assistance of project partners. Questionnaire sections included trip motivation, planning and information sources, transportation, accommodations, activities, group composition, and basic demographics (Appendix D).

Response rate

Throughout the summer of data collection, a total of 4,358 parties were contacted and 1,318 questionnaires obtained from eligible tourists, resulting in a 60% compliance rate (**Table 1**). A total of 24 surveys were unusable, thus 1,294 questionnaires were used for analysis. Nearly two-thirds (60.3%) of respondents were contacted in July (**Figure 2**) and a majority (79.6%) of respondents was contacted on a weekend (Friday afternoon thru Sunday) (**Figure 3**). Over half of respondents completed the questionnaire while at an area attraction (**Figure 4**). Among those eligible who did not participate, 55.2% specified a lack of interest in participating.

Table 1 Non response among 2012 Metropolitan Area Visitor Survey

	June		July		August		Overall	
	n	%	n	%	n	%	n	%
People contacted	**766**		**2,742**		**850**		**4,358**	
Ineligible (e.g. non-tourist)	231	30.2	1,483	54.1	457	53.8	2,171	49.8
Leisure-related tourist	535	69.8	1,259	45.9	393	46.2	2,187	50.2
Completed questionnaire	253	47.3	789	62.7	276	70.2	1,318	60.3
Non-response	282	52.7	470	37.3	117	29.8	869	39.8
Non-responders:								
Gender:								
Female	121	42.9	267	56.8	72	61.5	461	53.0
Male	161	57.1	203	43.2	45	38.5	410	47.1
Reason:								
Lack of interest	160	56.7	251	53.4	69	59.0	480	55.2
In a hurry	80	28.4	137	29.1	32	27.4	249	28.6
Already completed	25	8.9	23	4.9	3	2.6	51	5.9
Other	15	5.3	27	5.7	5	4.3	47	5.4
English is second language	2	0.7	23	4.9	8	6.8	33	3.8
Too hot	0	0.0	9	1.9	0	0.0	9	1.0
Compliance rate		47.3		62.7		70.2		60.3

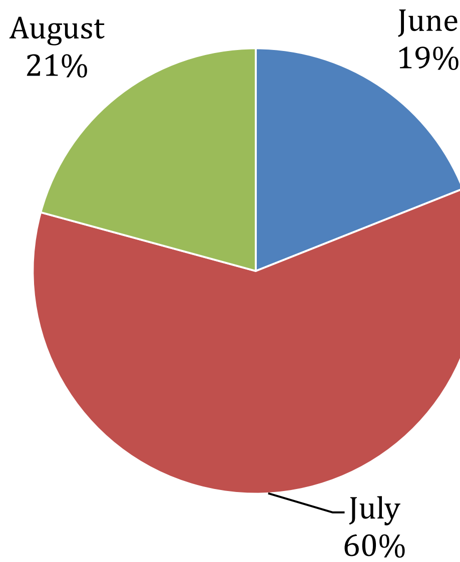


Figure 2 Month respondents completed 2012 Metropolitan Visitor Survey (n=1,294)

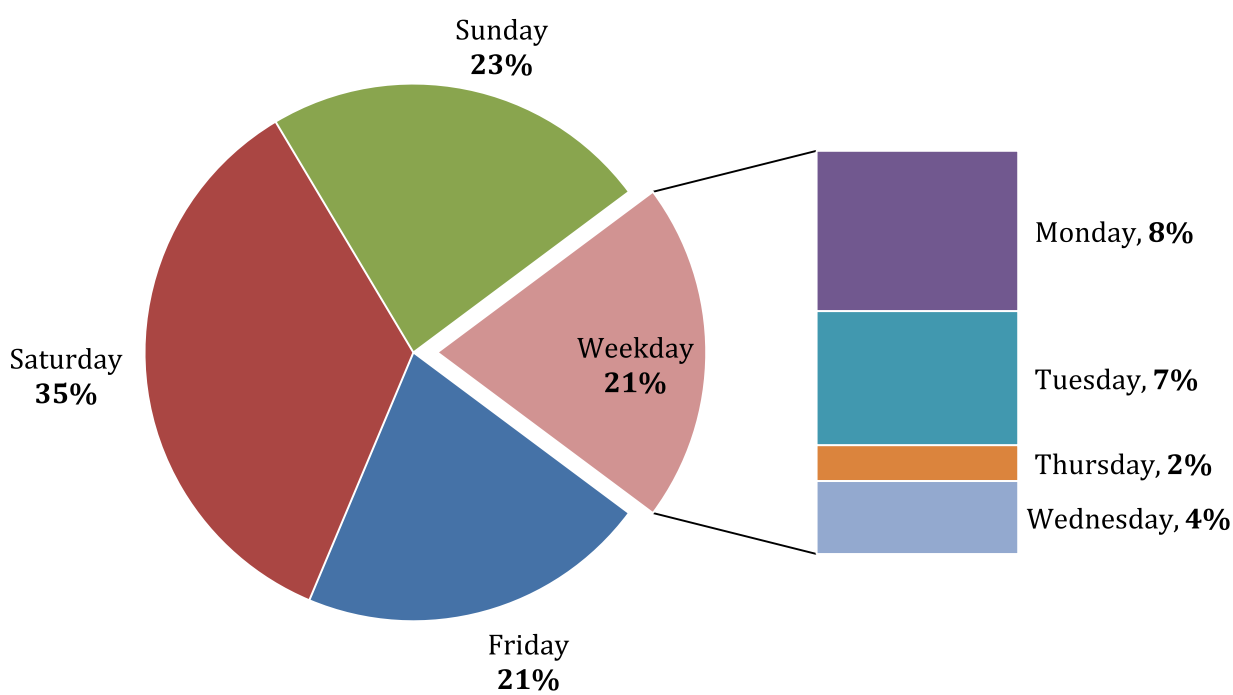


Figure 3 Day of the week respondents completed 2012 Metropolitan Area Visitor Survey (n=1,294)

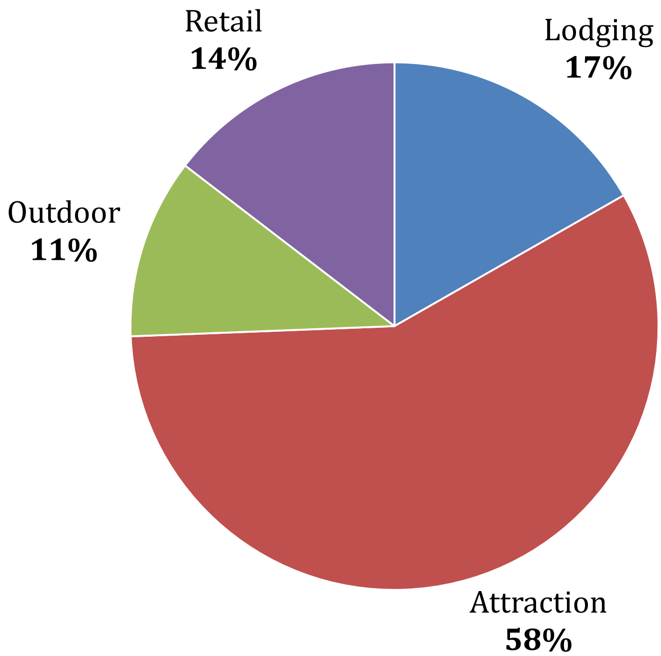


Figure 4 Location where respondents completed 2012 Metropolitan Area Visitor Surveys (n=1,294)

Analysis

Completed questionnaires were entered, cleaned and checked in SPSS version 19.0. Analysis provided means, medians, standard deviations, and frequencies to describe the sample and provide information on variables of interest. When individual responses were contributing to data skewness, they were winsorized to be where 90 to 95% of other responses were. When of interest, group comparisons by age groups, first time and repeat visitors, as well as lodging and activities were done with Chi-squares (χ^2). Trade Area analysis was conducted to create a customized trade area based upon the primary residence of visitors; the center of the trade area is the center-point of all domestic visitors' residences.

RESULTS

Within this section, results include an overview of respondent demographics, trip characteristics, and information sources used for trip planning.

Respondents

Demographics

More than half (58.4%) of respondents were female and the average age was 45 years (*M* = 44.71, *Mdn* = 44, *SD* = 14.79;
Figure 5; **Figure 6**). About one-third of the respondents were from the Baby Boomer generation and another third from Generation X (**Figure 7**). The most frequently reported annual pre-tax household income was between $50,000 and $99,999 (**Figure 8**).

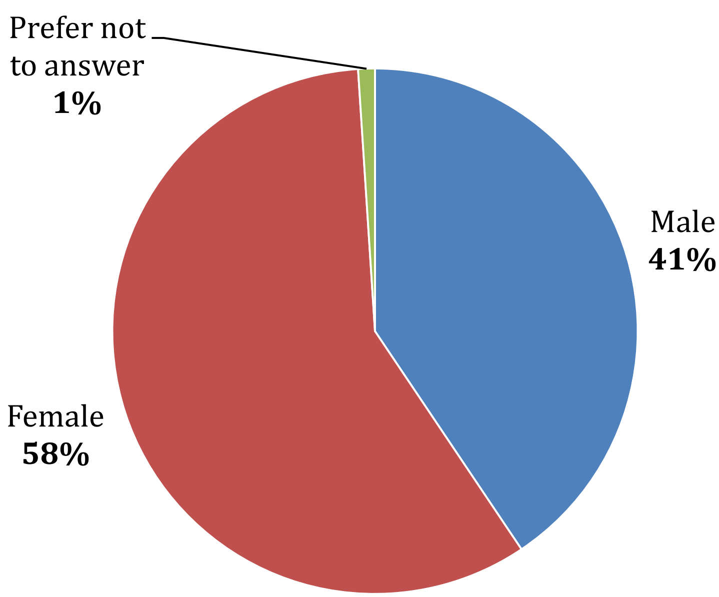
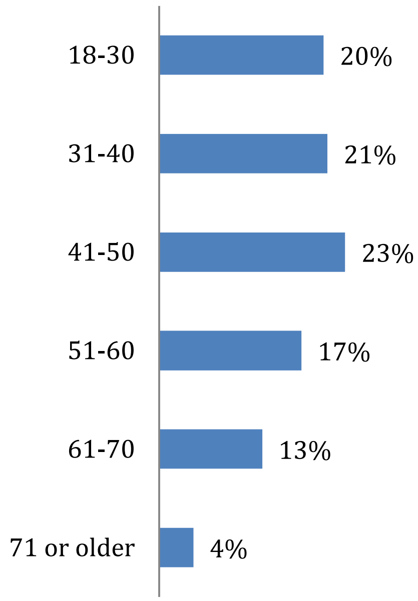


Figure 5 Gender of 2012 Metropolitan Area Visitor Survey respondents (n=1,264)



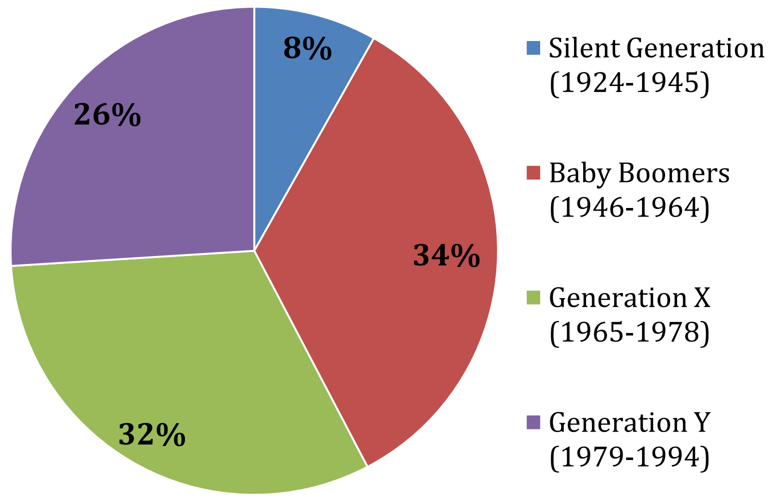


Figure 6 Age categories of 2012 Metropolitan Area Visitor Survey respondents (n=1,262)

Figure 7 Generational split of 2012 Metropolitan Area Visitor Survey respondents (n=1,262)

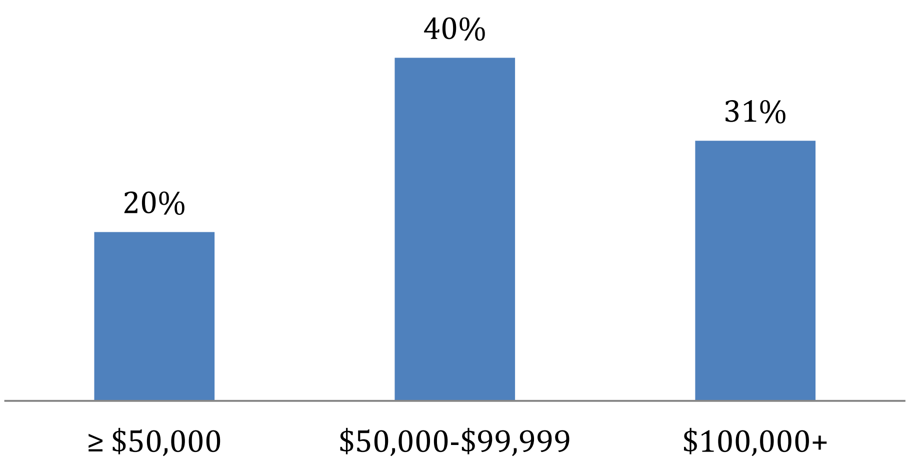


Figure 8 Pre-tax income groups of 2012 Metropolitan Area Visitor Survey respondents (n=1,175)

Primary residence

Nearly 9 out of 10 respondents to the Twin Cities Metropolitan Area were from the Americas (95.6%) and the United States specifically (88.6%; **Table 2**). The majority of domestic visitors were from the upper Midwest (**Figure 9**). Among international travelers, respondents were most frequently from Europe (2.7%).

Most frequently, domestic visitors were from the states of Minnesota (29.4%), Wisconsin (11.6%), and Iowa (7.2%) (**Table 3**). The Minneapolis-St. Paul Core Based Statistical Area (CBSA), which encompasses an 11-county area in Minnesota and Wisconsin, was home to 7.7% of domestic visitors. Other frequently reported CBSAs included Chicago-Naperville-Joilet, IL-IN-WI (4.4%) and Duluth, MN-WI (3.5%) (**Table 3**).

Table 2 Primary country of residence of 2012 Metropolitan Area Visitor Survey respondents (n=1,218)

	Frequency (n)	Percent (%)
The Americas	***1,218***	***95.9***
United States	1,147	88.6
Canada	65	5.0
Brazil	2	0.2
Costa Rica	2	0.2
Mexico	2	0.2
Europe	***34***	***2.7***
United Kingdom	12	0.9
Norway	7	0.5
Germany	5	0.4
Belgium	3	0.2
Italy	2	0.2
Czech Republic	1	0.1
Denmark	1	0.1
France	1	0.1
Netherlands	1	0.1
Sweden	1	0.1
Asia	***14***	***1.1***
China, Hong Kong	3	0.2
India	2	0.2
Japan	2	0.2
South Korea	2	0.2
Singapore	1	0.1
Vietnam	1	0.1
Iran	1	0.1
Saudi Arabia	1	0.1
United Arab Emirates	1	0.1
Oceania	***4***	***0.3***
Australia	2	0.2
New Zealand	2	0.2
Did not specify	24	1.9

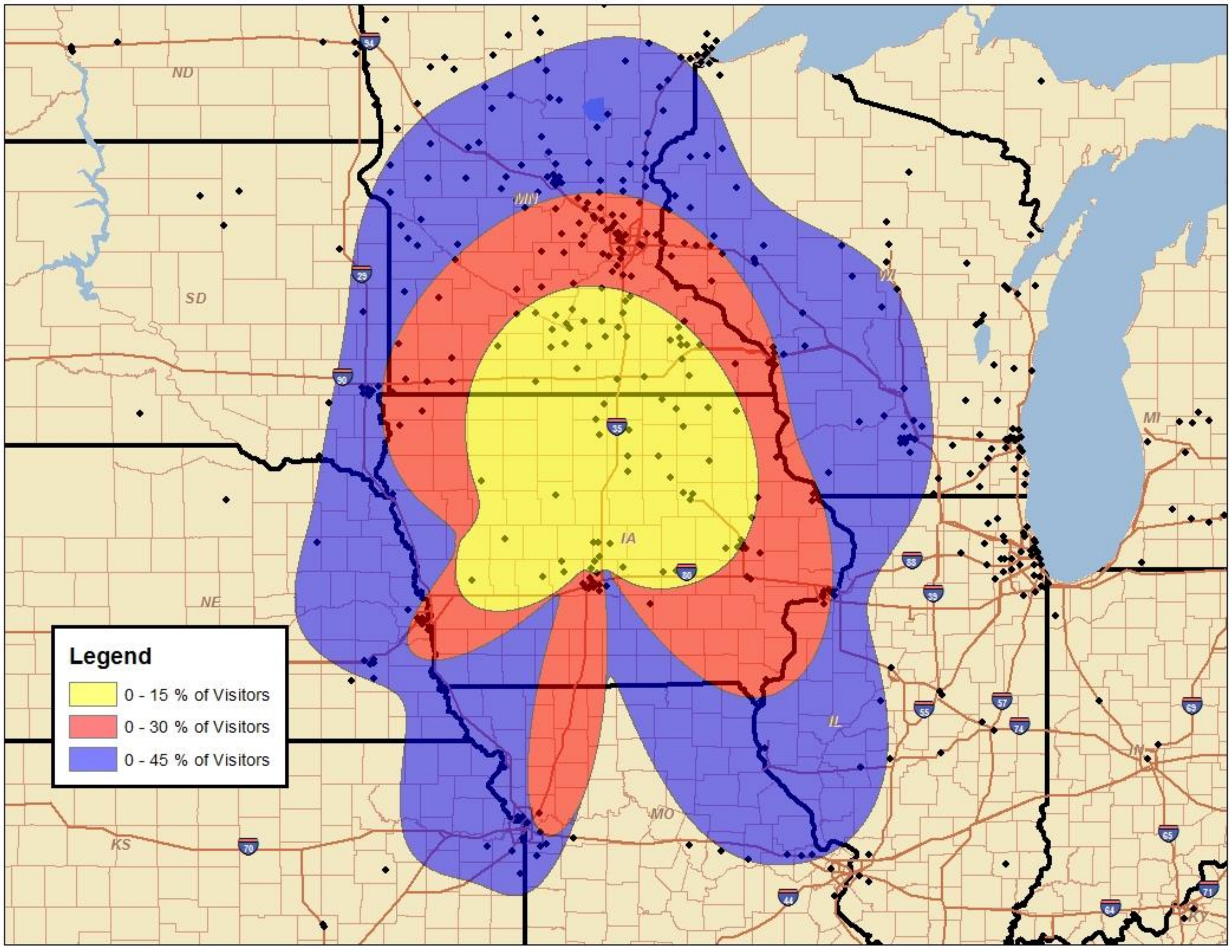


Figure 9 Trade area of 2012 Metropolitan Area Visitor Survey domestic respondents (n=1,046)

Table 3 Primary place of residence of 2012 Metropolitan Area Visitor Survey domestic respondents (n=1,046)

Top 10 states		**Top 10 Core Based Statistical Areas (CBSA)**	
State	**Percent (%)**	**CBSA**	**Percent (%)**
Minnesota	29.4	Minneapolis-St. Paul, MN-WI	7.7
Wisconsin	11.6	Chicago, IL-IN-WI	4.4
Iowa	7.2	Duluth, MN-WI	3.5
Illinois	5.7	Fargo, ND-MN	2.9
California	4.8	Rochester, MN	2.1
North Dakota	4.4	Los Angeles, CA	2.0
South Dakota	3.4	Milwaukee, WI	2.0
Michigan	2.6	Mankato, MN	1.9
Colorado	2.3	Washington, DC-VA-MD-WV	1.9
Ohio	2.2	Des Moines, IA	1.9

Past visitation

Nearly two-thirds of respondents (63.1%) had been to the Twin Cities Metropolitan Area at least once before. Among repeat visitors, about one-third respondents had been to the Twin Cities Metropolitan Area too many times to remember (**Figure 10**).

Within the past 12 months, respondents had made two trips to the area on average (*M* = 2.35, *Mdn* = 1.00, *SD* = 3.91), including their current trip. The majority (65.2%) of respondents, however, were making their first and only visit to the area in the past 12 months (
Figure 11).

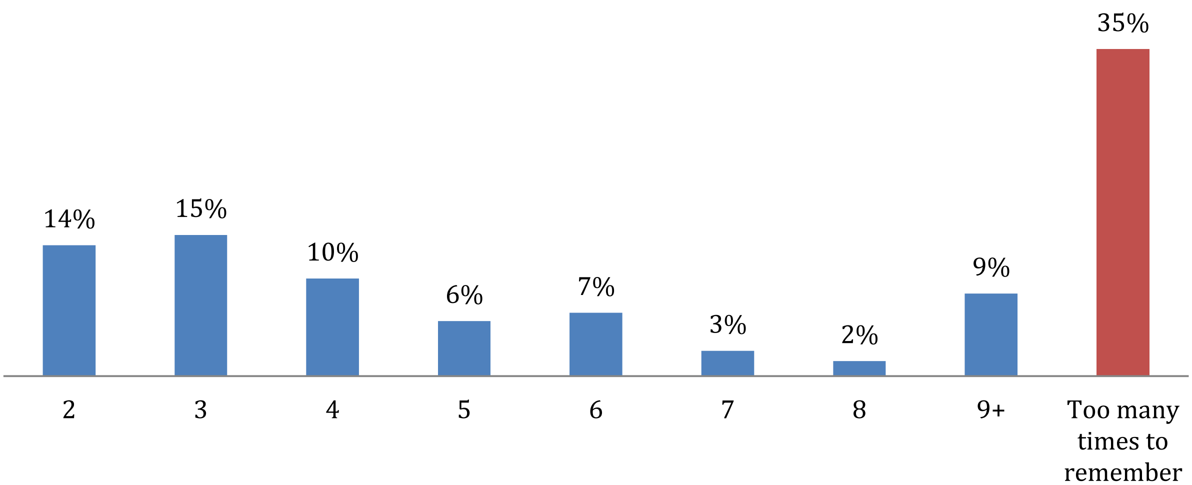


Figure 10 Previous trips to the Twin Cities Metropolitan area among repeat visitors completing 2012 Metropolitan Area Visitor Survey (n=817)

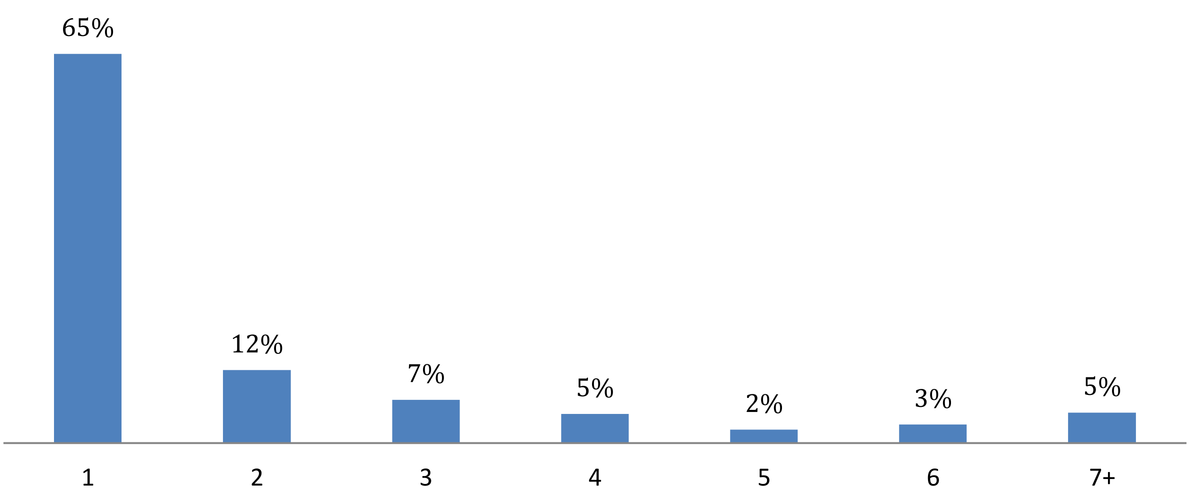


Figure 11 Number of visits to Twin Cities Metropolitan Area in past 12 months among 2012 Metropolitan Area Visitor Survey respondents (n=1,294)

2012 Trip information

Duration

More than 8 out of 10 respondents (85.8%) to the 2012 Metropolitan Area Visitor Survey spent at least one night in the area. Among all overnight visitors, the average respondent spent 4 nights in the area (*M* = 3.88, *Mdn* = 3.00, *SD* = 3.98; **Figure 12**). However, among those staying 7 days or fewer, the average number of nights was 3 (*M* = 2.91, *Mdn* = 3.00, *SD* = 1.53)

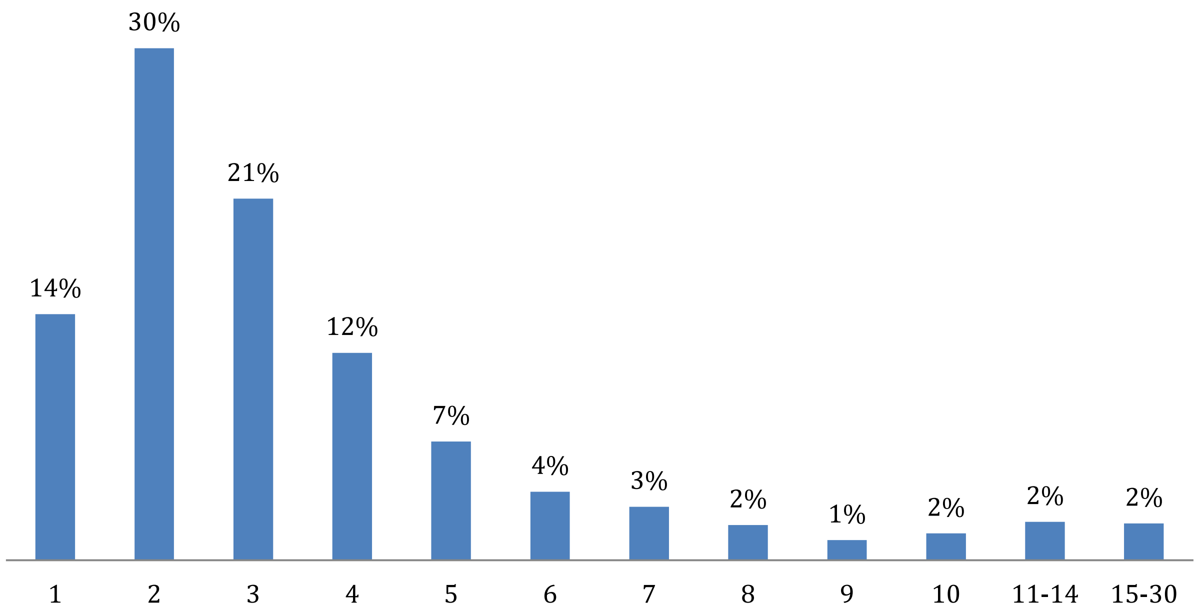


Figure 12 Number of nights stayed among overnight 2012 Metropolitan Area Visitor Survey respondents (n=1,031)

Lodging

The majority of respondents stayed in paid accommodations, most frequently a hotel, motel or historic inn (62.2%; **Figure 13**). However, about one third of respondents stayed at the home of a family or friend.

Location was a primary driver for all lodging choices (**Figure 14**). Price was particularly important for staying with friends and family. Among hotel guests, price hotel amenities and packages were also identified as primary reasons for lodging selection (
Figure 15).

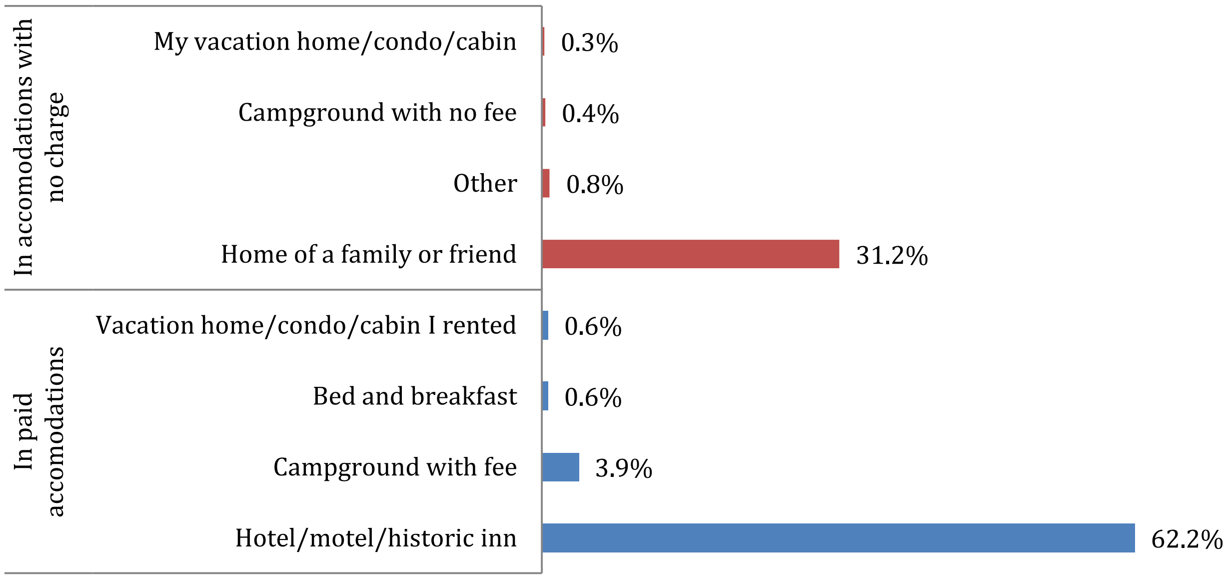


Figure 13 Accommodation type among overnight 2012 Metropolitan Area Visitor Survey respondents (n=1,089)

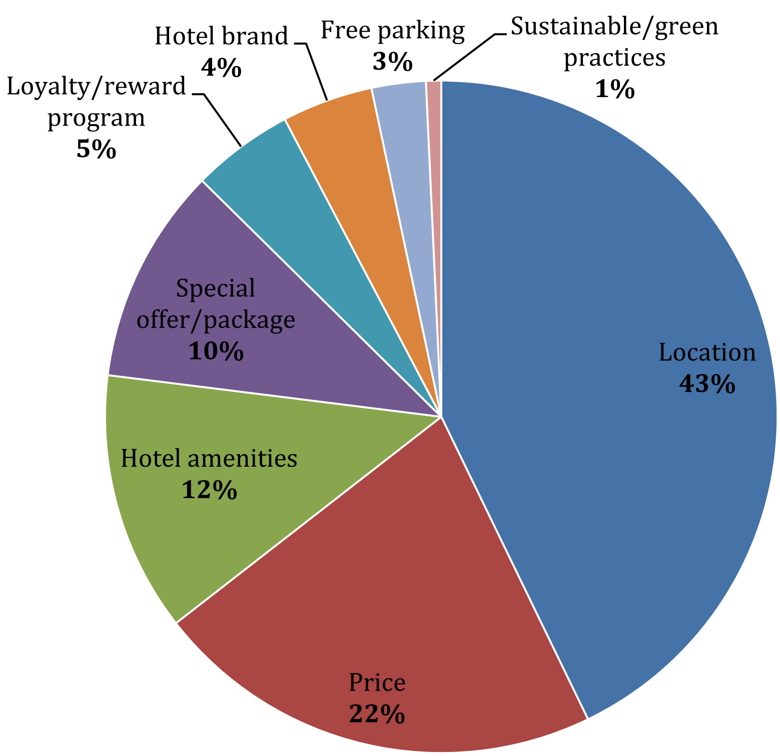


Figure 14 Primary reason for choosing lodging among overnight 2012 Metropolitan Area Visitor Survey respondents (n=956)

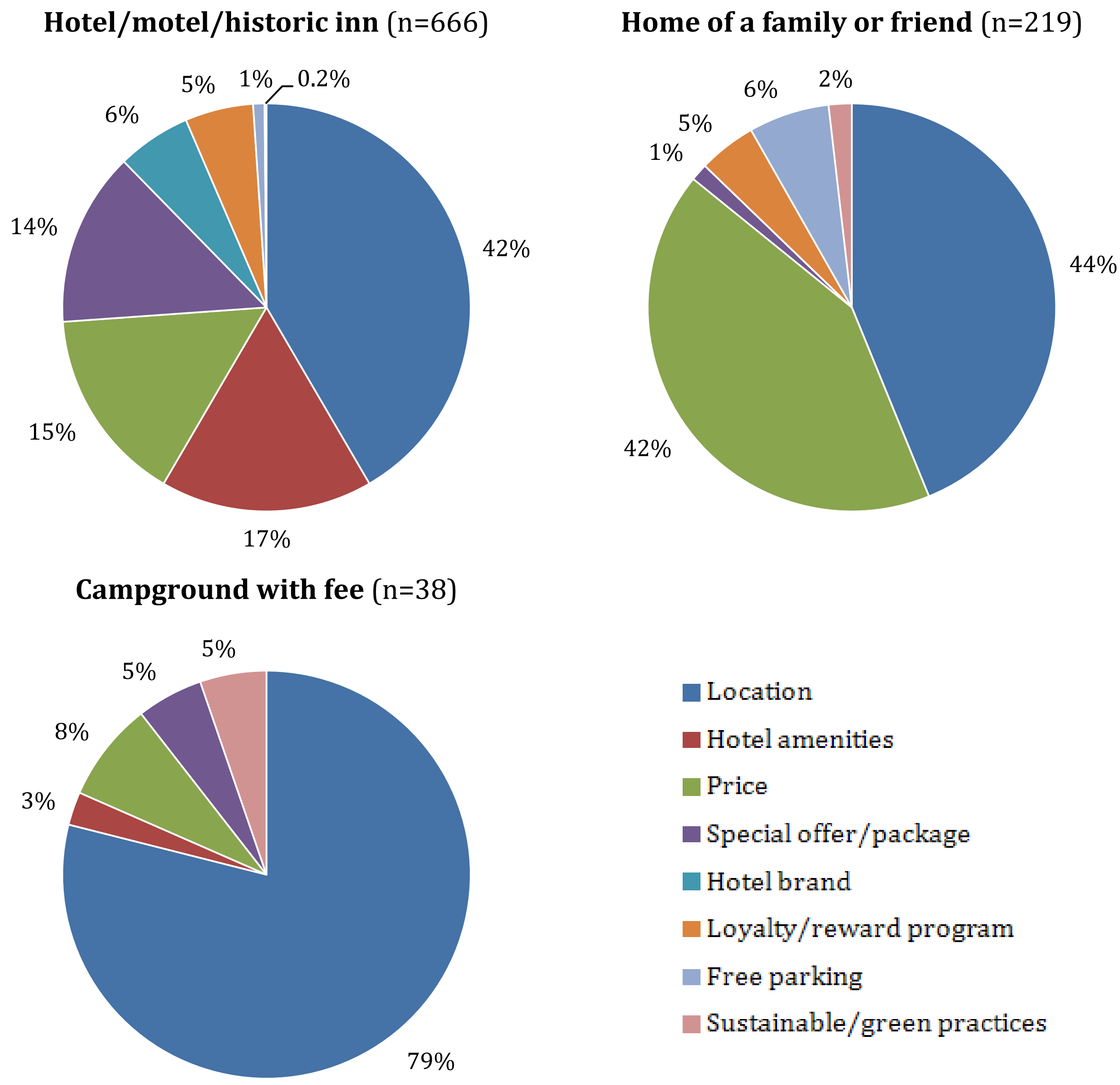


Figure 15 Primary reason for choosing lodging among select lodging types among overnight 2012 Metropolitan Area Visitor Survey respondents

Transportation

The majority of survey respondents arrived to the area by car, van or truck (73%; **Figure 16**) although one-fifth arrived by plane.

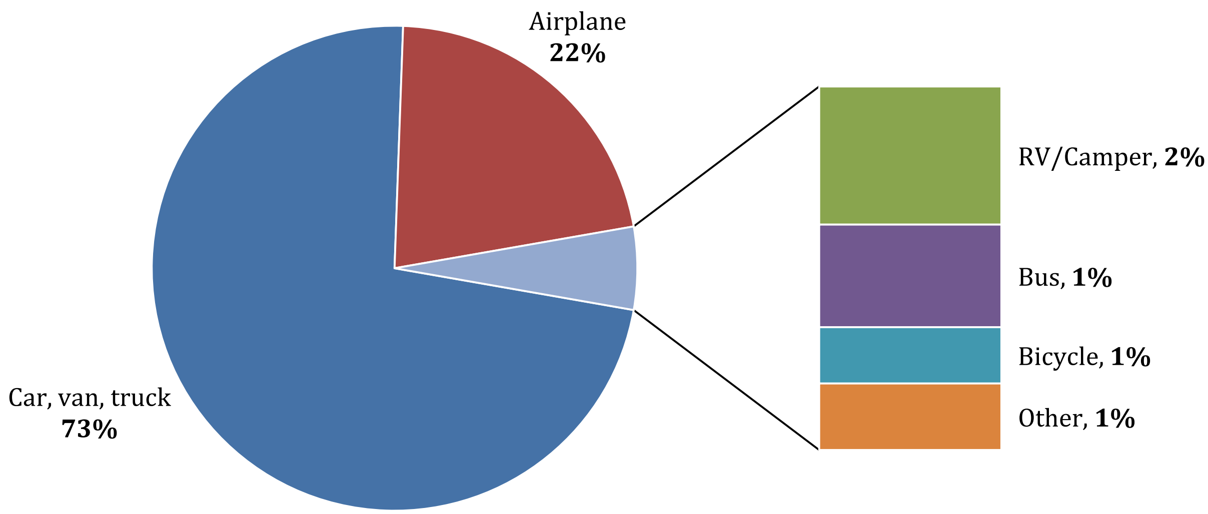


Figure 16 Primary mode of transportation among 2012 Metropolitan Area Visitor Survey respondents (n=1,287)

Group composition and size

The average respondent was traveling in a group of four people (*M* = 3.74, *Mdn* = 3.00, *SD* = 2.35). Just over half of respondents (52.5%) were traveling with family (**Figure 17**) and just under half (48.6%) were traveling with children under age 18. One third of travel groups had children under age 12, while nearly a fourth of groups had children aged 12-17

Figure 18). About one-fifth of respondents were couples. Groups of friends, families or some combination thereof were in groups between four and six people
Figure 19).

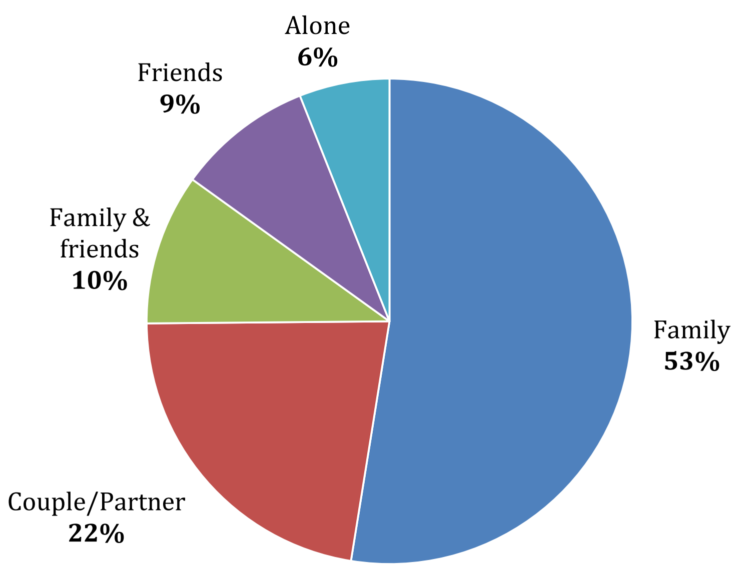


Figure 17 Group type among 2012 Metropolitan Area Visitor Survey respondents (n=1,281)

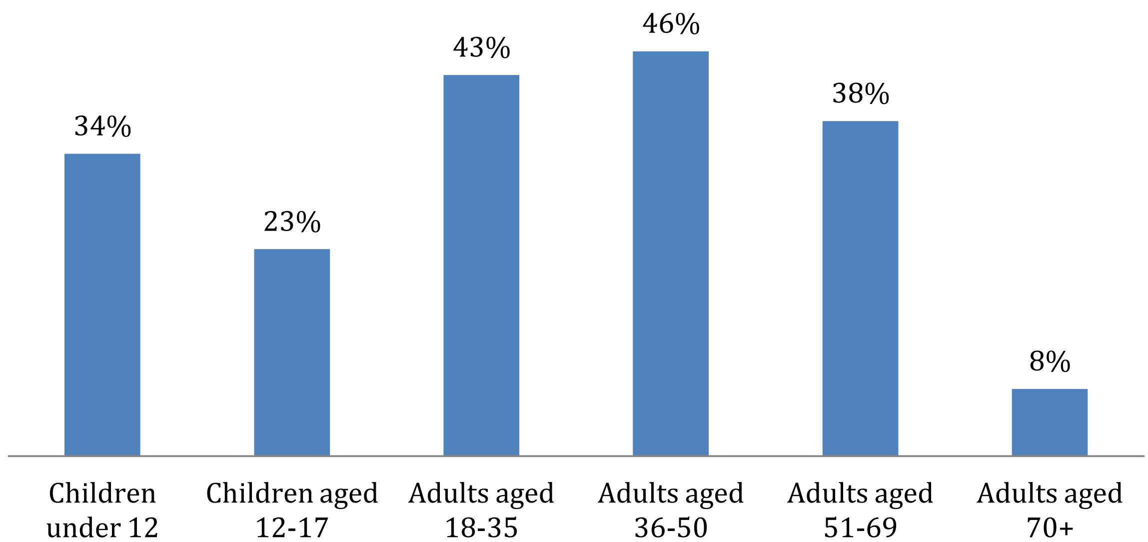


Figure 18 Age groups included in 2012 Metropolitan Area Visitor Survey respondents travel party (n=1,217)

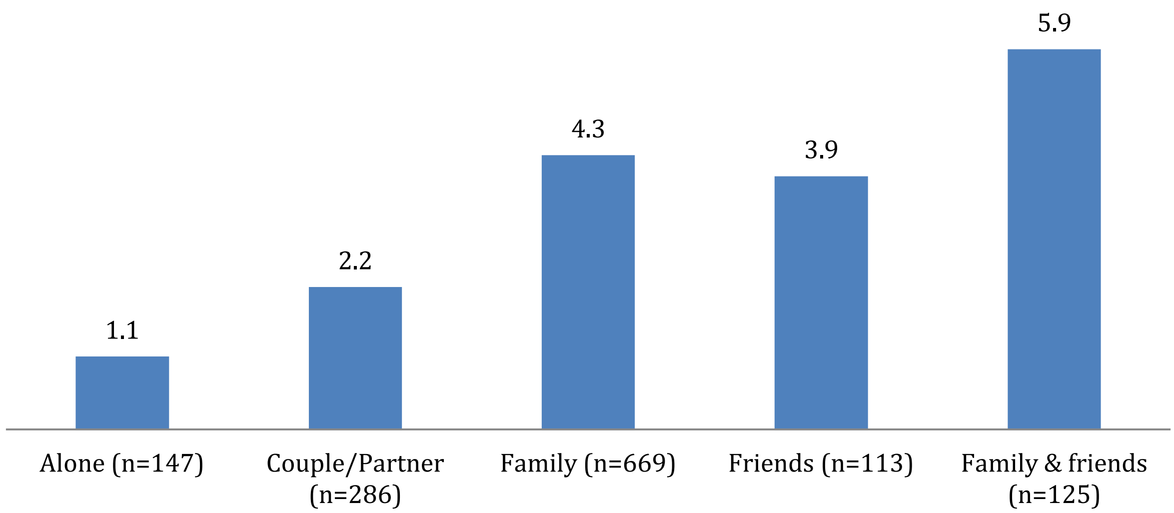


Figure 19 Average group size by group type among 2012 Metropolitan Area Visitor Survey respondents

Trip activities

Visitors participated in a variety of activities during their trip to the Twin Cities Metropolitan Area (**Figure 20**). Activity differences were examined among those traveling with and without children, among day and overnight travelers as well as by generational grouping.

Numerous significant differences ($p \leq .05$) in activity participation existed between respondents traveling with and without children (**Figure 21**). Visitors traveling with children, for example, were more likely to visit amusement parks (38.1% vs. 9.2%) and water parks (23.9% vs. 4.3%), go to the Mall of America (50.8% vs. 34.8%), and go fishing (5.0% vs. 1.5%). Visitors traveling without children, conversely, were more likely to visit art museums (28.0% vs. 12.9%) and friends or relatives (38.6% vs. 29.2%); shop for arts, crafts, and antiques (16.6% vs. 8.3%); and attend professional sporting events (11.4% vs. 7.2%). No significant differences ($p \leq .05$) in participation between respondents traveling with and without children were observed for dining out; participating in boating/sailing, casino gaming, canoeing/kayaking, golfing, hiking, or wildlife viewing; visiting museums or spas; attending college tours, fairs or festivals; or general mall shopping, buying gifts/souvenirs, or outlet shopping.

Activity participation also differed among overnight and day visitors (**Figure 22**). For example, overnight visitors were significantly ($p \leq .05$) more likely to dine out (91.3% vs. 74.1%), go swimming (22.8% vs. 9.9%), visit friends or relatives (37.4% vs. 15.4%), and go to the Mall of America (47.7% vs. 11.7%).

Several significant differences ($p \leq .05$) in activity participation by generation emerged (**Table 4**). For example, respondents in Generation X were more likely to participate in visiting waterparks, amusement parks, and fishing but less likely to be visiting family and friends, art museums or historic sites. Generation Y indicated greater participation in nightlife and sightseeing while they shared higher participation in casino gaming with respondents in the Silent Generation. Those in the Silent Generation identified less frequent visitation to the Mall of America and antique shops but greater guided tour participation.

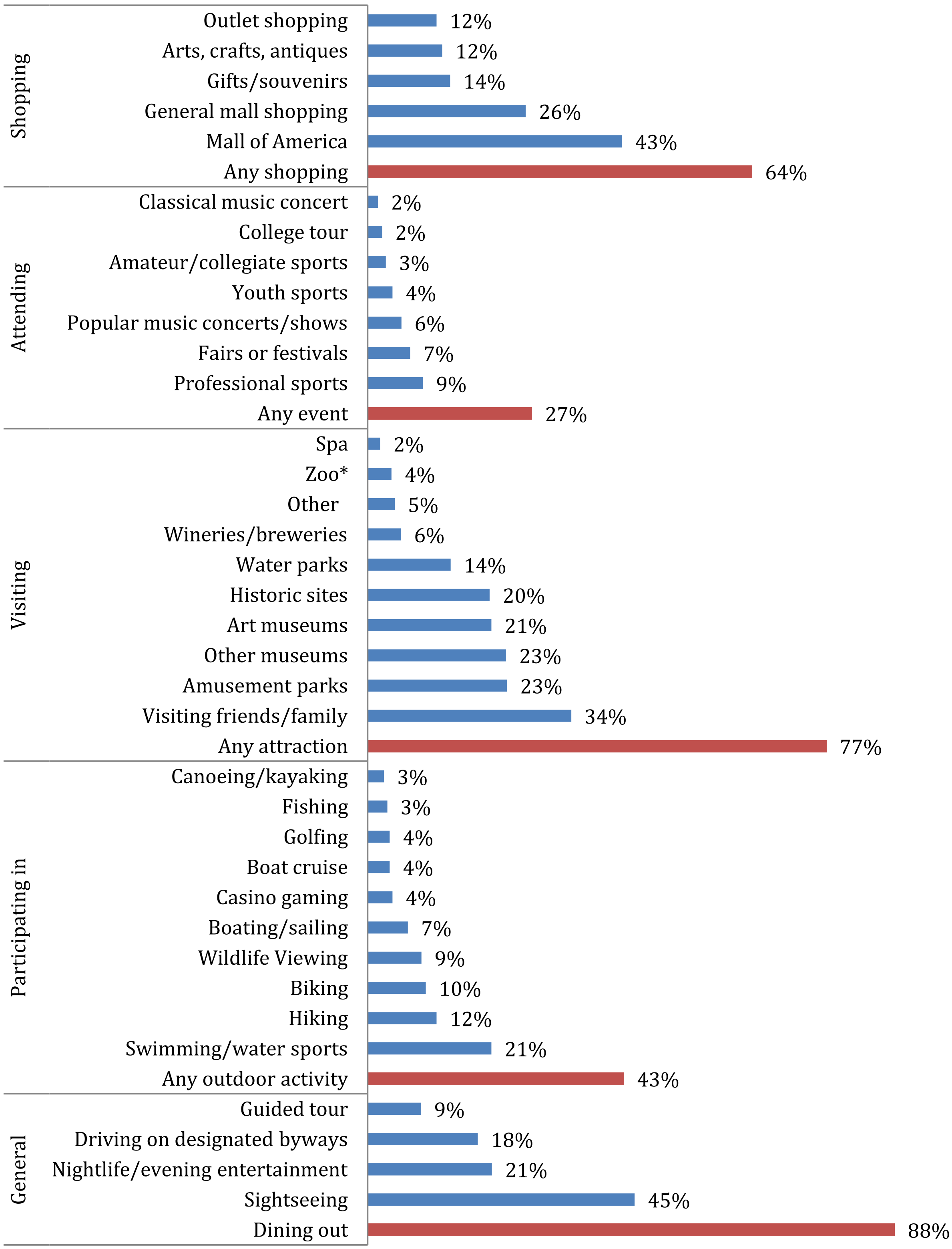


Figure 20 Activities participated in among 2012 Metropolitan Area Visitor Survey respondents (n=1,274)
Note: "Zoo" added based upon large number of write-in responses

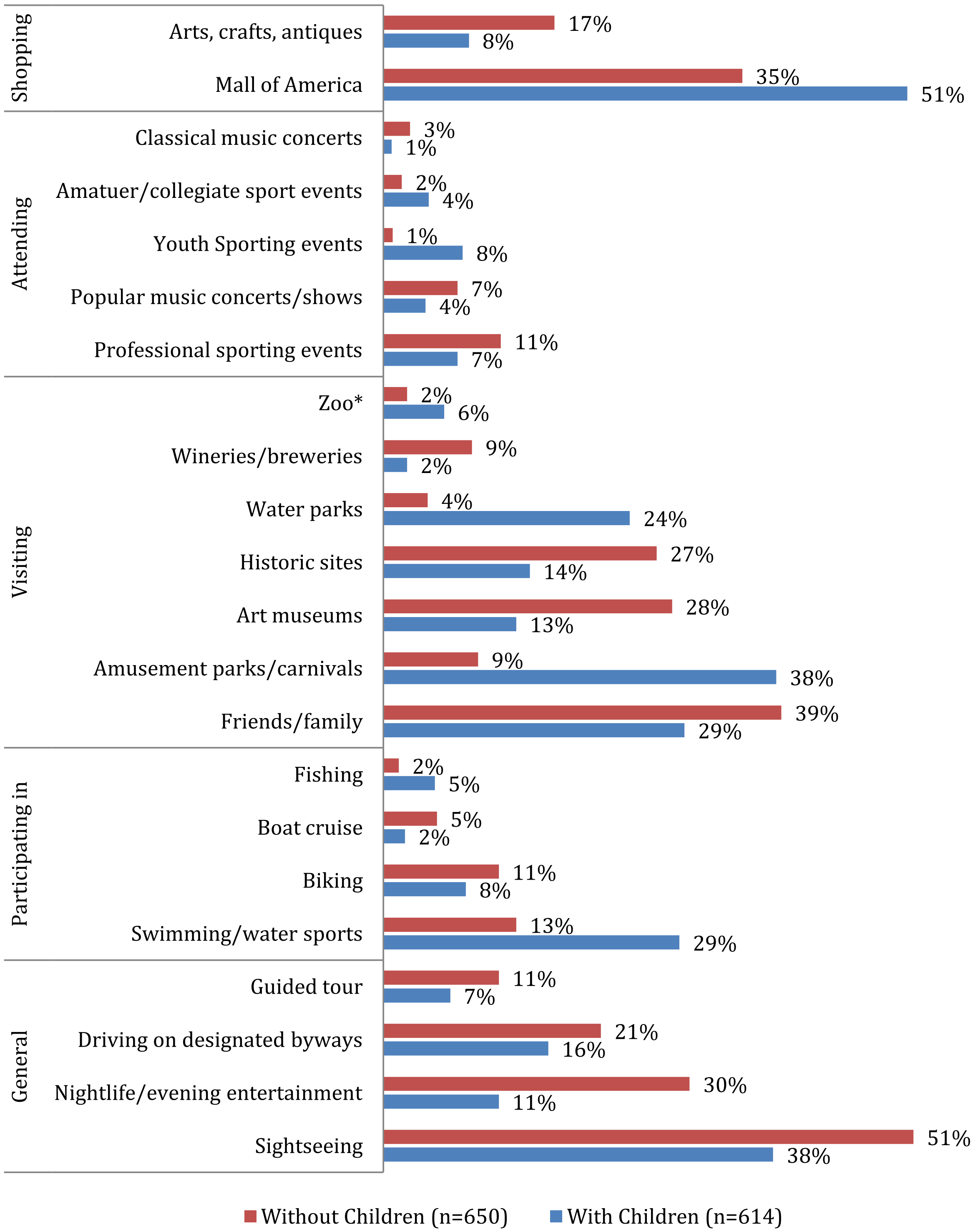


Figure 21 Significant differences ($p \leq .05$) in activity participation among visitors traveling with and without children among 2012 Metropolitan Area Visitor Survey respondents (n=1,264)
Note: "Zoo" added based upon large number of write-in responses

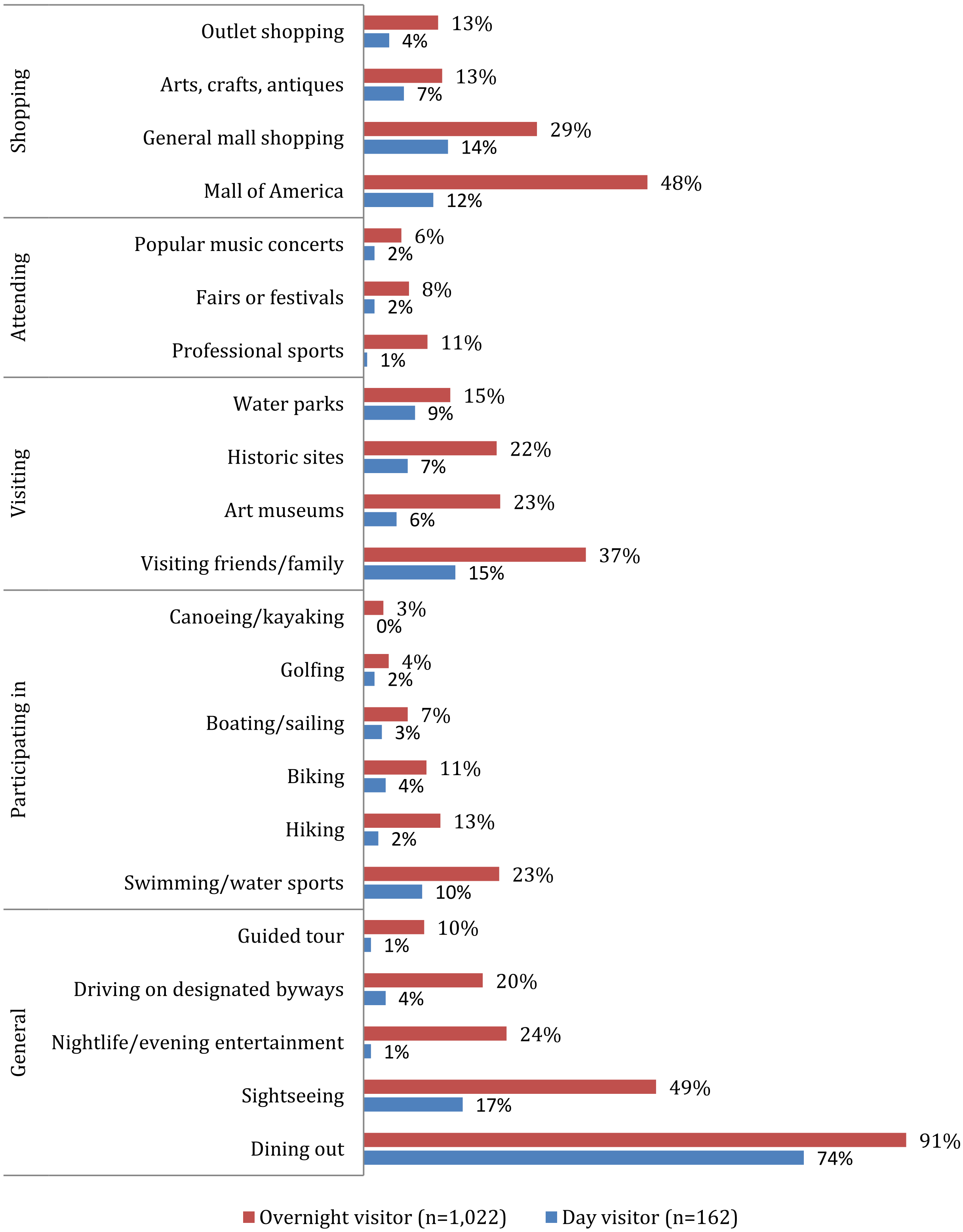


Figure 22 Significant differences ($p \leq .05$) in activity participation among overnight and day visitors among 2012 Metropolitan Area Visitor Survey respondents (n=1,084)

Table 4 Differences in activity participation among generational groups in 2012 Metropolitan Area Visitor Survey respondents

	Percentage (%) of generation visiting attraction				*Statistics*		
	Silent Generation (1924-45) *(n=101)*	Baby Boomers (1946-64) *(n=429)*	Generation X (1965-78) *(n=395)*	Generation Y (1979-94) *(n=326)*	χ^2	**Sig.**	
General							
Dining out	87.1	88.6	88.9	88.0	0.29	.961	
Sightseeing	42.6	42.7	40.8	52.1	10.69	.013	*
Nightlife	13.9	19.3	13.2	35.0	56.72	.000	***
Designated Byways	16.8	21.0	16.7	17.2	3.14	.369	
Guided tour	14.9	11.2	5.8	8.3	11.76	.008	**
Participating in							
Water sports	7.9	15.4	26.8	24.8	29.71	.000	***
Hiking	5.9	12.6	11.9	12.0	3.61	.306	
Biking	5.0	10.3	8.6	12.0	5.16	.160	
Wildlife viewing	3.0	7.7	10.9	10.4	7.88	.049	*
Boating/sailing	5.0	5.6	7.3	8.3	2.84	.416	
Casino gaming	6.9	3.3	2.8	6.4	8.76	.033	*
Golfing	1.0	5.4	3.0	3.4	5.88	.117	
Boat cruise	3.0	4.7	2.8	3.7	2.20	.531	
Fishing	2.0	1.6	5.8	3.1	12.01	.007	**
Canoeing/kayaking	1.0	1.6	3.5	4.0	5.86	.118	
Visiting							
Friends/family	42.6	33.1	27.8	41.1	17.33	.001	***
Amusement parks	7.9	17.7	33.7	23.0	44.58	.000	***
Other museums	26.7	24.5	22.8	20.9	2.14	.544	
Art museums	28.7	20.5	14.9	24.8	15.43	.001	***
Historic sites	26.7	25.2	14.7	18.7	17.09	.001	***
Water parks	5.0	11.0	22.5	10.4	37.52	.000	***
Wineries/breweries	3.0	5.4	5.1	7.7	4.15	.245	
Other	8.9	5.4	3.5	2.8	8.60	.035	*
Zoo[1]	2.0	3.0	5.6	4.3	4.62	.201	
Spa	1.0	1.9	2.0	3.1	2.13	.544	
Attending							
Professional sports	5.9	7.9	11.9	9.5	5.39	.145	
Fairs or festivals	5.0	5.1	6.6	11.0	11.06	.011	*
Popular music show	7.9	6.3	4.6	5.5	2.19	.533	
Youth Sports	1.0	4.4	6.6	1.5	14.32	.002	**
Amateur/collegiate sports	3.0	3.5	3.5	1.8	2.23	.524	
College tour/ visit	4.0	2.3	1.8	2.8	1.90	.592	
Classical music concerts	3.0	1.9	1.0	1.8	2.22	.527	
Shopping							
Mall of America	23.8	38.0	48.6	47.5	27.45	.000	***
General mall	29.7	25.9	24.8	27.9	1.52	.676	
Gifts/souvenirs	8.9	13.8	14.4	14.4	2.27	.518	
Arts, crafts, antiques	8.9	16.1	10.1	12.3	8.18	.042	*
Outlet Shopping	4.0	9.8	13.2	14.4	10.59	.014	*

[1] "Zoo" added based upon large number of write-in responses

** $p \le .05$. ** $p \le .01$. *** $p \le .001$*

Trip purpose and planning

Primary reason for making trip

Respondents most frequently indicated that the primary reason for the trip was to visit family and friends (35%), but visiting attractions was also a frequently cited reason for the trip (30%; **Figure 23**). All other reasons were much less frequently identified as a primary reason to visit the Twin Cities Metropolitan Area.

When examined by group type, this pattern of visiting friends and attractions held for those visiting as a couple or group of friends (**Table 5**). Notably, just 10% of couple groups indicated the romantic getaway was their primary trip purpose. Those visiting alone indicated museums were a primary draw whereas groups with family or family and friends indicated attractions was the primary draw. Family and friends groups had the most diverse set of reasons for the trip.

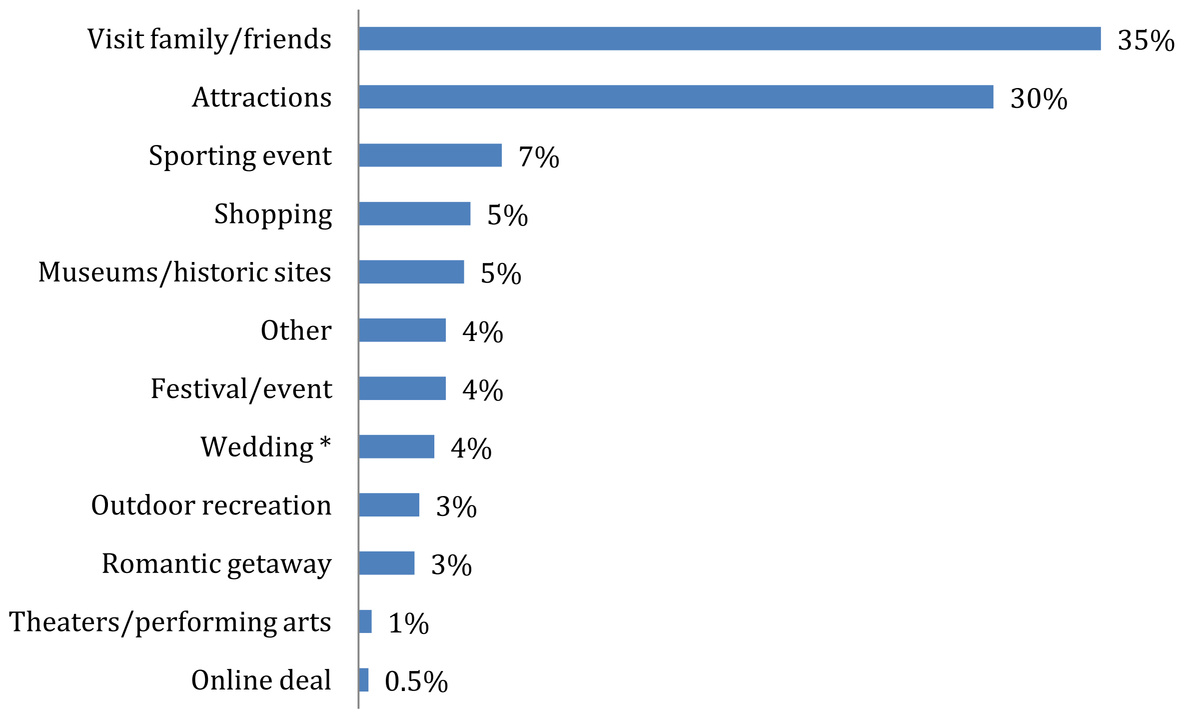


Figure 23 Primary reason for making leisure trip to Twin Cities Metropolitan Area among 2012 Metropolitan Area Visitor Survey respondents (n=1,291)
Note: "Wedding" added based upon large number of write-in responses

Table 5 Primary reason for making leisure trip to Twin Cities Metropolitan Area among 2012 Metropolitan Area Visitor Survey group types

	Percentage (%) of group type				
	Alone *(n=77)*	Couple/Partner *(n=285)*	Family *(n=671)*	Friends *(n=116)*	Family & friends *(n=129)*
Visit family/friends	54.5	35.4	32.0	51.7	22.5
Attractions	9.1	15.4	40.8	14.7	30.2
Sporting event	3.9	6.7	5.5	7.8	13.2
Shopping	1.3	7.4	5.8	1.7	2.3
Museums/historic sites	11.7	6.0	4.2	2.6	4.7
Festival/event	7.8	5.6	3.3	2.6	4.7
Other	6.5	4.2	2.1	11.2	7.0
Wedding*	2.6	4.2	2.5	3.4	8.5
Outdoor recreation	1.3	3.9	2.1	3.4	5.4
Romantic getaway	1.3	10.2	0.6	0.0	0.0
Theaters/performing arts	0.0	1.1	0.6	0.9	0.0
Online deal	0.0	0.0	0.4	0.0	1.6

Note: "Wedding" added based upon large number of write-in responses

Trip planning timeframe and information sources

Slightly over half of all respondents (51.4%) planned their trip a month or more in advance (**Figure 24**). Nearly a third of respondents (30.2%), however, planned their trip within two weeks of its occurrence.

In terms of most frequently used and most important, a similar pattern emerged for the top three information sources. Family and friends, area/destination website and online reviews were the most frequently used information sources and also identified as the most important information sources for respondents to the Twin Cities Metropolitan Area (**Figure 25**).

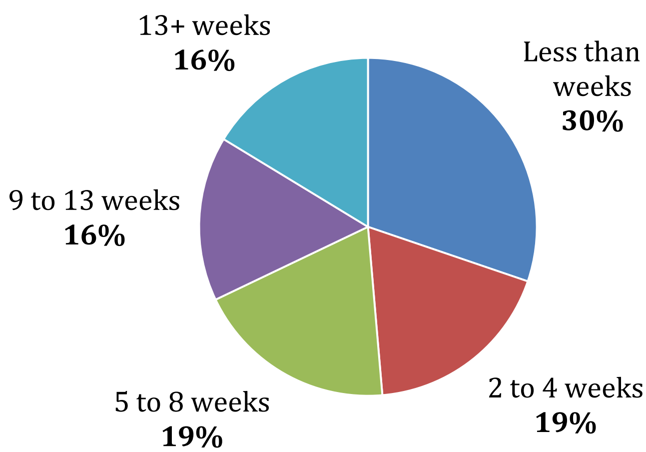


Figure 24 Trip planning time frame among 2012 Metropolitan Area Visitor Survey respondents (n=1,287)

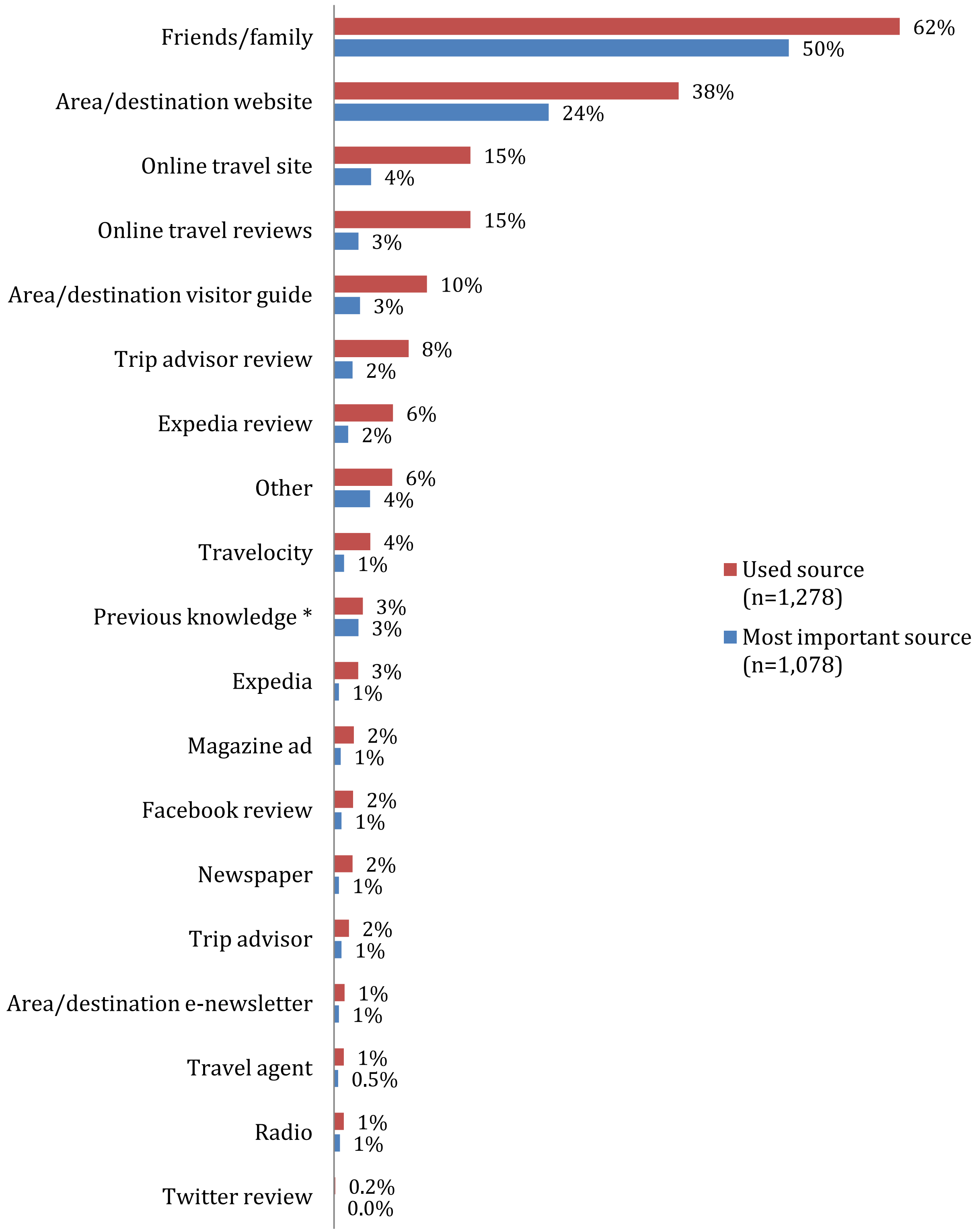


Figure 25 Information sources used by, and identified as most important by, 2012 Metropolitan Area Visitor Survey respondents (%; n=1,278)
Note: "Previous knowledge" added based upon large number of write-in responses

The two most important information sources, “friends/family” and “area/destination website”, hold across generational groups (**Table 6**), type of group (**Table 7**), and past visitation (**Figure 26**).

Table 6 Most important information sources for trip planning among generational groups in the 2012 Metropolitan Area Visitor Survey respondents

	Percentage (%) of generation listing source as most important			
	Silent Generation (1924-45) *(n=91)*	**Baby Boomers (1946-64)** *(n=359)*	**Generation X (1965-78)** *(n=332)*	**Generation Y (1979-94)** *(n=270)*
Friends/family	62.6	53.8	40.1	55.2
Area/destination website	14.3	21.2	29.2	23.0
Online travel site	2.2	4.5	4.8	3.0
Other	3.3	3.9	4.8	2.2
Area/destination visitor guide	2.2	2.8	3.9	1.5
Online travel review	1.1	3.3	2.4	3.0
Previous knowledge *	3.3	2.5	2.7	3.0
Trip Advisor review	0.0	0.8	3.3	3.0
Expedia review	1.1	1.1	2.4	1.1
Travelocity	1.1	1.4	1.2	0.4
Facebook review	1.1	0.6	0.9	1.1
Magazine ad	1.1	1.4	0.3	0.4
Trip Advisor	1.1	0.0	1.5	0.7
Radio	1.1	0.6	0.6	0.7
Area/destination e-newsletter	0.0	1.1	0.6	0.0
Newspaper	3.3	0.8	0.0	0.0
Expedia	1.1	0.0	0.6	1.1
Travel Agent	0.0	0.3	0.6	0.7

Note: “Previous knowledge” added based upon large number of write-in responses

Table 7 Most important information sources for trip planning among group types for 2012 Metropolitan Area Visitor Survey respondents

	Percentage (%) of group type listing source as most important				
	Alone *(n=64)*	Couple/Partner *(n=238)*	Family *(n=568)*	Friends *(n=98)*	Family & friends *(n=103)*
Friends/family	60.9	50.8	45.8	62.2	54.4
Area/destination website	12.5	21.4	26.6	12.2	29.1
Online travel site	1.6	5.9	4.8	1.0	1.0
Other	7.8	1.7	4.0	7.1	3.9
Area/destination visitor guide	4.7	1.3	2.8	4.1	3.9
Online travel review	1.6	4.6	2.8	0.0	1.0
Previous knowledge *	4.7	2.1	3.3	1.0	1.0
Trip Advisor review	0.0	2.9	1.8	3.1	1.9
Expedia review	0.0	2.1	1.8	2.0	0.0
Travelocity	3.1	1.3	1.1	0.0	1.0
Facebook review	0.0	0.8	1.1	1.0	0.0
Trip Advisor	1.6	0.8	0.7	2.0	0.0
Magazine ad	0.0	1.3	0.9	0.0	0.0
Radio	0.0	0.4	1.1	0.0	0.0
Area/destination e-newsletter	0.0	0.4	0.5	1.0	1.0
Newspaper	0.0	1.3	0.4	1.0	0.0
Expedia	1.6	0.4	0.4	0.0	1.9
Travel Agent	0.0	0.4	0.4	2.0	0.0

Note: “Previous knowledge” added based upon large number of write-in responses

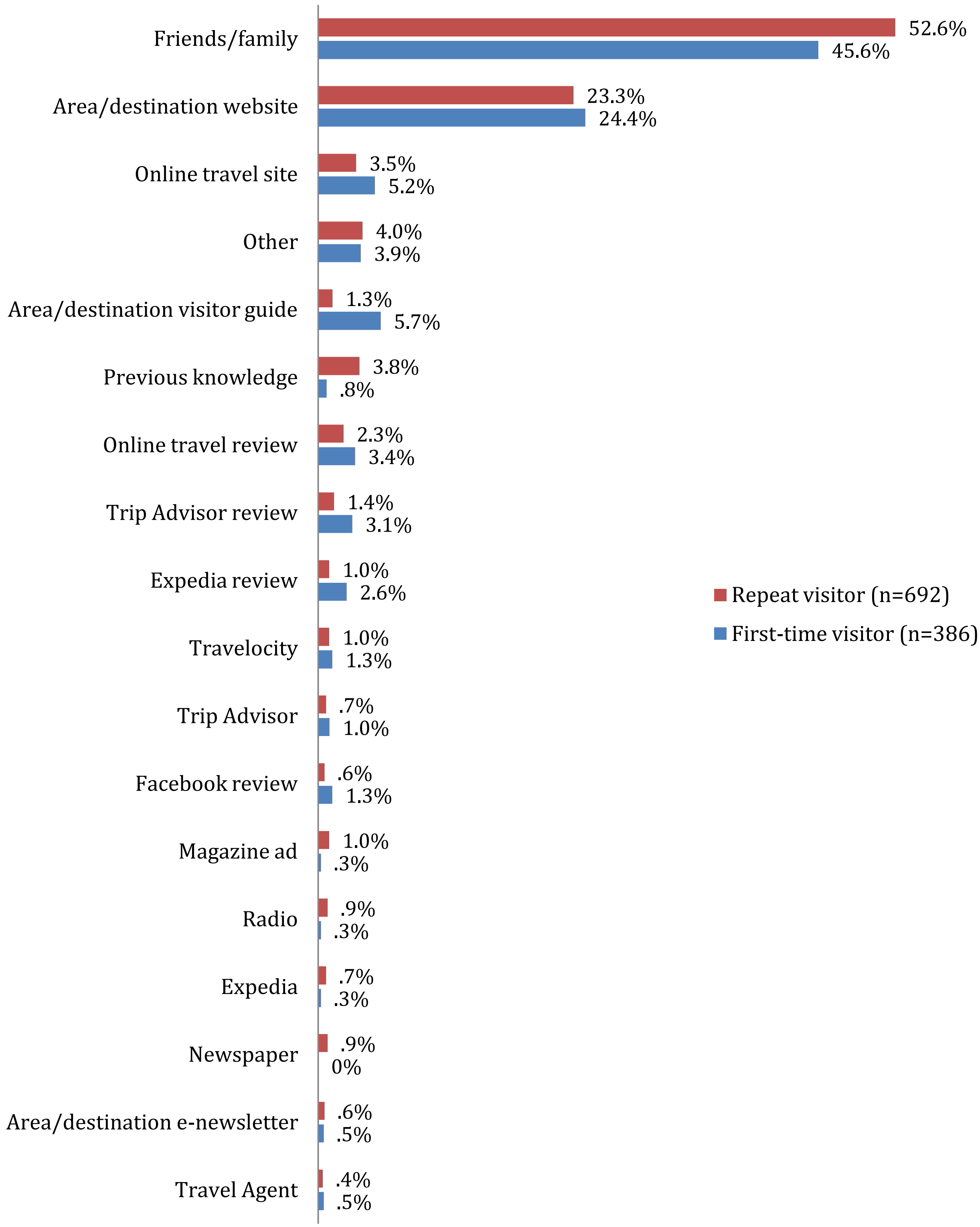


Figure 26 Most important information sources for trip planning among first-time and repeat visitors of the 2012 Metropolitan Area Visitor Survey respondents

Use of social media during trip

Respondents used a variety of mobile and electronic media to share and get information during their trip (**Figure 27**). Nearly half of respondents (45.9%) reported using the internet and/or websites to get or share information. Facebook was the most frequently used social media site (34.7%), while other social media sites such as Instagram (3.6%) and Twitter (2.8%) were less frequently used. Respondents reported using a large variety of mobile media, including smartphones (31.3%), text messaging (21.8%), mobile apps (12.9%), and iPads and tablets (11.9%).

The majority of respondents (78.3%) did not change their original travel plans based upon information found on social media (**Figure 28**). A fifth of respondents reported making minor changes to their original travel plans based on social media, while just over one percent reported making significant changes. The lack of change to original travel plans did not significantly differ by generational group (**Figure 29**).

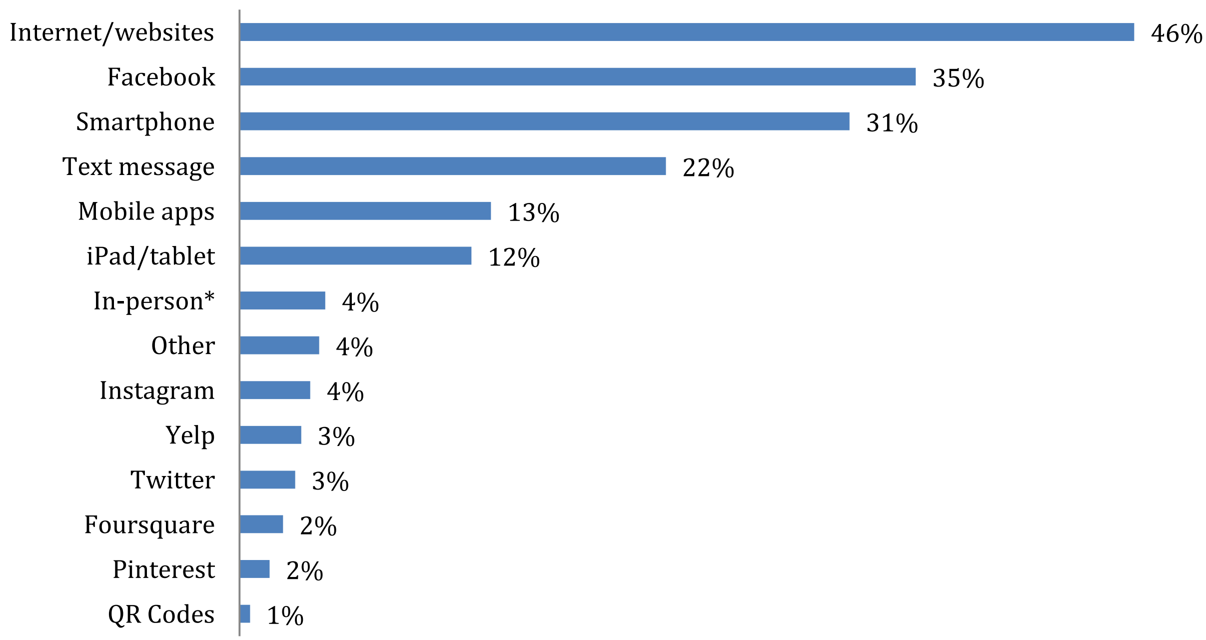


Figure 27 Information sharing and acquisition sources among 2012 Metropolitan Area Visitor Survey respondents during their trip (n=1,294)
Note: "In person" added based upon large number of write-in responses

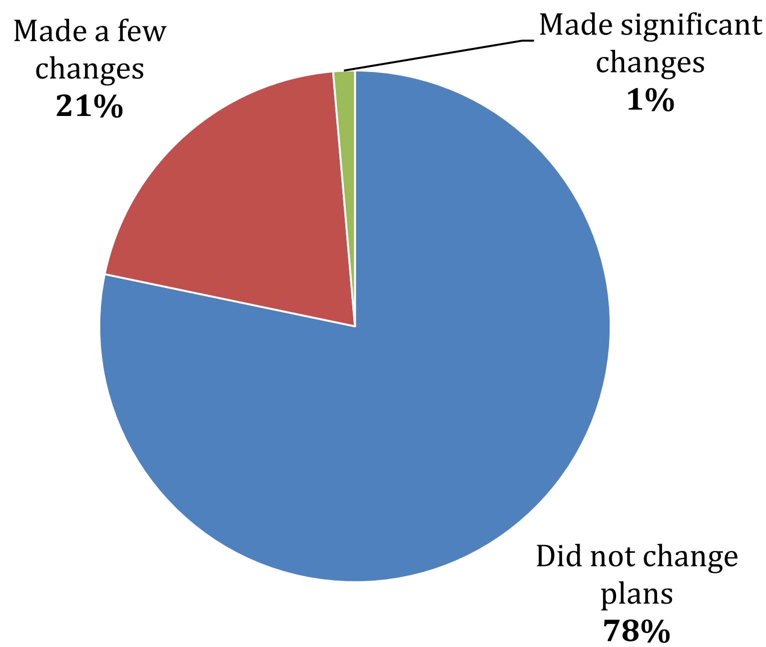


Figure 28 Impact of social media on original travel plans among 2012 Metropolitan Area Visitor Survey respondents (n = 1,247)

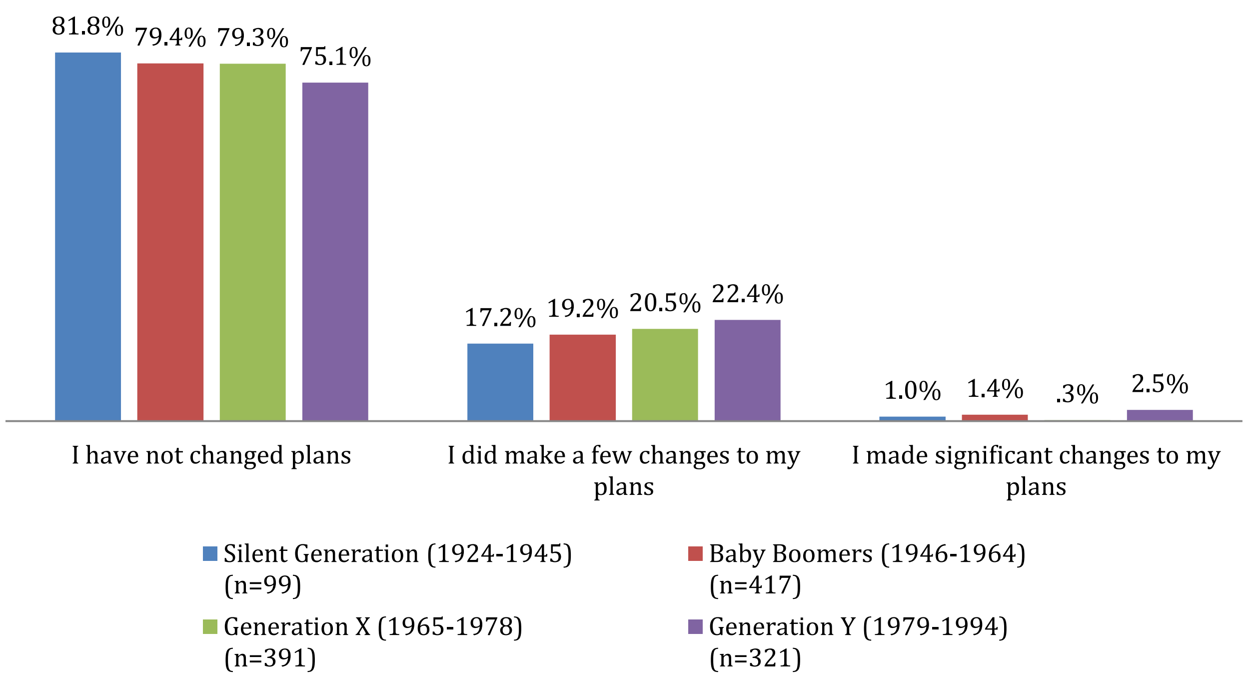


Figure 29 Impact of social media information on original travel plans by generation among 2012 Metropolitan Area Visitor Survey respondents

A comparison of media sources used to share and get information across generations revealed notable differences (**Table 8**). While no differences in internet use in general existed among users, Generation X and Generation Y were both more likely to use Facebook, smartphones, and mobile applications to share and get information during their trip. Generally, there was an inverse relationship between media usage and age.

Table 8 Comparison of social media sources and mobile devices used to share and get information across generations among 2012 Metropolitan Area Visitor Survey respondents (n= 1262)

	Percentage (%) of generation using media				*Statistics*		
Media	**Silent Generation (1924-45)** *(n=103)*	**Baby Boomers (1946-64)** *(n=431)*	**Generation X (1965-78)** *(n=400)*	**Generation Y (1979-94)** *(n=328)*	**χ^2**	**Sig.**	
Internet/websites	41.7	46.2	50.0	43.6	4.02	.259	
Facebook	10.7	22.0	40.5	52.1	106.51	.000	***
Smartphone	14.6	22.3	35.5	43.6	56.02	.000	***
Text message	6.8	19.5	21.3	31.4	32.37	.000	***
Mobile apps	7.8	10.2	12.8	18.9	15.51	.001	***
iPad/tablet	3.9	11.8	14.0	12.2	7.98	.046	*
In-person[1]	10.7	6.0	2.3	2.7	19.01	.000	***
Instagram	1.0	1.6	2.8	8.5	29.72	.000	***
Other	9.7	6.5	2.0	1.8	23.21	.000	***
Yelp	0.0	2.1	4.8	4.0	8.71	.033	*
Twitter	1.0	1.6	3.0	5.2	9.83	.020	*
Foursquare	1.0	0.5	3.8	3.0	12.22	.007	**
Pinterest	0.0	1.2	1.5	2.4	---	---	
QR Codes	0.0	0.0	0.5	1.5	---	---	

[1] "In person" added based upon large number of write-in responses

[2] Responses too low for statistical comparisons

* *p ≤ .05.* ** *p ≤ .01.* *** *p ≤ .001*

Type of media used was related to changing original travel plans because of other travelers' opinions, reviews, photos, videos, or other information found on social media websites (**Table 9**). Visitors who used the internet, Facebook, smartphones, mobile apps, iPads or tablets, Yelp, and Twitter were more likely to make at least a few changes to their travel plans than others. For example, while only 21.8% of all respondents changed their original travel plans based on social media, 37.8% of Twitter users did. Not all forms of media, however, were associated with changed plans. Users of Instagram, text messaging, and Foursquare were not significantly more likely to change their original travel plans than the average respondent.

Table 9 Change in original travel plans based on social media by media source and media device among 2012 Metropolitan Area Visitor Survey respondents

	Percentage (%)		*Statistics*		
Media	**Made at least a few changes** [1]	**Did not change plans**	**χ^2**	**Sig.**	
Twitter (n=37)	37.8	62.2	5.82	.016	*
Yelp (n=41)	34.1	65.9	3.84	.050	*
iPad/tablet (n=152)	33.6	66.4	14.22	.000	***
Mobile app (n=165)	32.7	67.3	13.52	.000	***
Facebook (n=435)	28.0	72.0	15.66	.000	***
Instagram (n=47)	27.7	72.3	1.01	.315	
Internet/website (n=577)	26.5	73.5	14.45	.000	***
Smartphone (n=395)	25.8	74.2	5.69	.017	*
Text message (n=276)	25.0	75.0	2.23	.136	
Foursquare (n=29)	24.1	75.9	0.10	.751	
Other (n=52)	17.3	82.7	0.63	.429	
QR codes (n=7) [2]	42.9	57.1	---	---	
Pinterest (n=17) [2]	35.3	64.7	---	---	

[1] In total sample, 21.8% of respondents made at least a few changes to their plans

[2] Responses too low for statistical comparisons

* *$p \le .05$. ** $p \le .01$. *** $p \le .001$*

BRIEF DISCUSSION

The 2012 summer visitor to the Twin Cities Metro Tourism area is demographically comparable to the 2007 visitor in terms of age, income, and trip characteristics (as reported by Davidson-Peterson, 2008).

Notable differences between the 2012 respondents and the 2007 questionnaire include the percent of international tourists (11% in 2012 compared to 2007's 7%). Respondents in 2012, on average, also traveled in larger groups (3.74 vs. 2.6), were far less likely to be traveling alone (6% vs. 20%), and more likely to be traveling with children under 18 (49% vs. 28%). 2012 respondents were also more likely to be day trippers than were 2007 respondents (14.2% vs. 9%). While the data is not directly comparable due to sampling sizes and timeframes sampled, these differences are of interest.

One of the most unexpected findings was that only 1% of respondents reported theaters or performing arts as their primary reason for making a leisure trip to the Twin Cities Metropolitan Area. This result is not directly comparable with past studies as the 2007 report did not include theater/performing arts as an option for trip motivation, though similar percentages of respondents in 2007 and 2012 reported attending classical music concerts, popular music concerts, and shows. A possible explanation for the low proportion of respondents visiting the area primarily for theater/performing arts is that no performing arts venue was included as a sampling site. More research is needed to accurately gauge the importance of theater/performing arts to the Twin Cities Metropolitan Area's tourism market.

Information sources for trip planning in 2012 were similar in that family and friends and generally 'the internet' were still important and frequently used sources. However, the 2012 study differentiated types of internet sites and social media used to obtain and share information, based on the evolving marketplace. Perhaps of most interest is the depth to which the use of information sources and activities were explored in this report by group type, generational group and visitation pattern. Each of these analyses provides insight for niche and targeted marketing opportunities.

Given the rapidly changing online marketplace, the use of social media and various media platforms is of significant interest and a major trend (Smith, 2012). While friends and family remained the primary and most important information source for the majority of the respondents, area websites was a very frequently used second source of information for trip planning. However, online travel sites and reviews are increasingly of use as important information sites.

Results indicate that sharing travel experiences via social media was negatively related to age, similar to Ip, Lee and Law (2010) and Broner and de Hogg (2011). While research is evolving in this area, Broner and de Hogg (2011) found five primary factors for information sharing/eWOM about travel: 1) for economic gain, 2) to help others, 3) to create a sense of community, 4) for consumer empowerment and 5) to help companies. Smith (2012) reports consumers are overwhelmed with the amount of data available to them. Subsequently, Smith encourages destinations to provide opportunities for consumers to customize their information and provide direct access to information most important to them.

Although respondent's demographic makeup does not appear to have changed substantially since 2007, their use of information and some travel party characteristics have. Understanding the breadth of impact of these changes as well as responding to them will maximize efficient use of marketing and planning dollars. Updating the profile information every three to five years is recommended to address the evolving marketplace.

REFERENCES

Bronner, F., & de Hogg, V. (2011). Vacationers and eWOM: Who posts and why, where and what? *Journal of Travel Research, 50(1),* 15-26.

Davidson-Peterson Associates. (2008). The Profile of Travelers in Minnesota (2005/2007). Davidson-Peterson Associates, Kennebuck, ME.

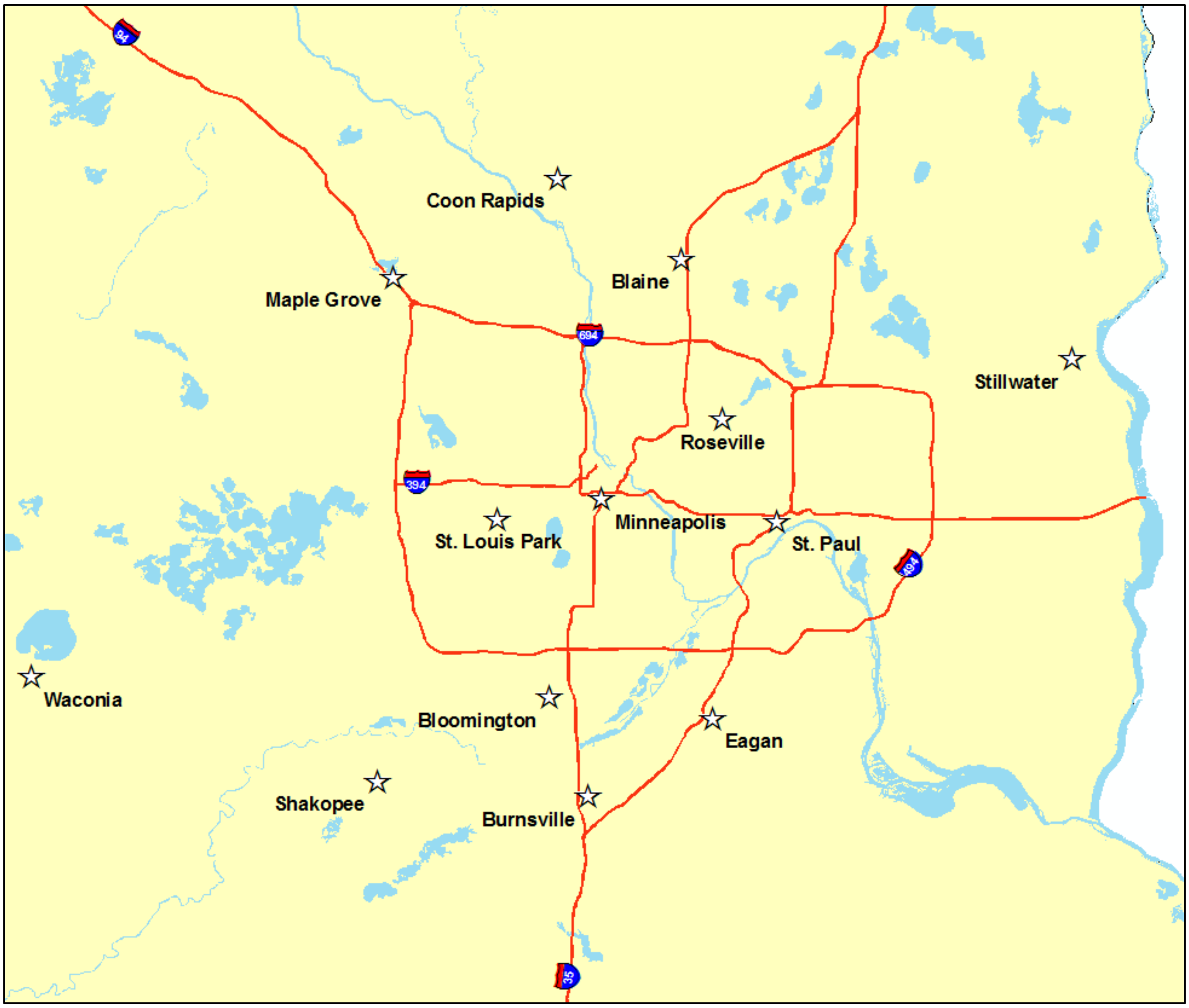
Ip, C., Lee, H.A., & Law, R. (2010). Profiling the Users of Travel Websites for Planning and Online Experience Sharing. *Journal of Hospitality and Tourism Research, 36,* 418-426.

Smith, A. (2012). Reaching Audiences in the Digital Age: Key Research Trends to Watch. Presentation at the Florida Governor's Tourism Conference. Retrieved September 17, 2012 from www.**pewinternet**.org/~/.../Aaron%20Smith%20FL%20Tourism.ppt

US Census Bureau. (2012, April). Annual Estimates of the Population of Metropolitan and Micropolitan Statistical Areas: April 1, 2010 to July 1, 2011 (CBSA-EST2011-01). US Census Bureau, Data Integration Division. Retrieved from http://www.census.gov/popest/data/metro/totals/2011/index.html

APPENDICES

Appendix A: Study area



Appendix B: Weekday sampling

Monday, June 25
Tuesday, July 3
Thursday, July 5
Wednesday, July 11
Tuesday, July 24
Monday, August 6
Wednesday, August 8

Appendix C: Study sites

Accommodations	
Best Western Plus Bloomington, MN	**Best Western Plus** Coon Rapids, MN
Country Inn & Suites Bloomington, MN	**Country Inn & Suites** Coon Rapids, MN
Crowne Plaza Minneapolis Airport Hotel Bloomington, MN	**Crowne Plaza Minneapolis West** Bloomington, MN
Hilton Minneapolis/Bloomington Bloomington, MN	**Radisson Hotel Bloomington** Bloomington, MN
Radisson Hotel Roseville Roseville, MN	**Water Street Inn** Stillwater, MN
Attractions	
Bunker Beach Water Park Coon Rapids, MN	**Canterbury Park Racetrack and Card Club** Shakopee, MN
Landmark Center Saint Paul, MN	**Mill City Museum** Minneapolis, MN
Minneapolis Sculpture Garden Minneapolis, MN	**Minnesota History Center** Saint Paul, MN
Minnesota Zoo Apple Valley, MN	**National Sports Center** Blaine, MN
Science Museum of Minnesota Saint Paul, MN	**Twin Cities Highlight Tour** Bloomington, MN
Valleyfair Amusement Park Shakopee, MN	**Walker Art Center** Minneapolis, MN
Water Park of America Bloomington, MN	
Outdoors	
Bunker Hills Campground Coon Rapids, MN	**Bunker Hills Golf Club** Coon Rapids, MN
Lake Harriet Refectory Minneapolis, MN	**Minnehaha Regional Park** Minneapolis, MN
Retail	
Alfresco Casual Living Stillwater, MN	**Burnsville Center** Burnsville, MN
Lola's Lakehouse Waconia, MN	**Mall of America** Bloomington, MN
Rosedale Center Roseville, MN	**The Shoppes at Arbor Lakes** Maple Grove, MN
The Shops at West End St. Louis Park, MN	

Appendix D: Survey instrument

Tourism Center
University of Minnesota

Metropolitan Area Visitor Survey 2012

1.What was the primary reason that you made this leisure trip to the area? (Check √ only 1)

__Attractions/family fun __Festival/event __Museums/historic sites
__Online deal (ie. Group on, etc.) __Outdoor recreation __Romantic getaway
__Shopping __Sporting event __Theaters/performing arts
__Visit family/friends __Other (Explain:_____________)

2. How far in advance did you plan this trip ? (Check √ only 1)

__Less than 2 weeks __2 to 4 weeks (1 month) __5 to 8 weeks (1 to 2 months)
__9 to 13 weeks (2 to 3 months) __13+ weeks

3. What information sources did you use to plan this trip? (Check √ all that apply)

__ Area/destination website __Area/destination visitor guide __Area/destination e-newsletter
__Friends/family __Magazine ad __Newspaper
__Online travel reviews __Online travel sites __Radio
Which ones? Which ones? __Travel agent
__Expedia __Expedia __Other (what? ____________)
__Facebook __Travelocity
__Trip Advisor __Trip Advisor
__Twitter

4. Which of the information sources you checked above was the most important? Please circle it in the question above.

5. Which of the following will you use to share or get information about your travel during this trip? (Check √ all that apply)

__Facebook __Foursquare __Internet/websites __Instagram __iPad / tablet
__Mobile apps __Text message __Twitter __Pinterest __ QR codes
__Smartphone __Yelp __Other (Explain: ____________)

6. Including this trip, how many times have you travelled to the area...

in the last 12 months? ___ times last 12 months
ever? ___ times ever OR ___too many to remember

7. What was your primary mode of transportation you used for this trip?

__ Airplane __Bicycle __Bus __Boat __Car, van, truck
__Motorcycle __RV/Camper __Train __Other

8. How many nights are you staying in the Minneapolis-St Paul area? __ # of nights (if 0, go to question 11)

9. Are you staying overnight....(Check √ only 1)

In paid accommodations
__A hotel/motel/historic inn
__A bed and breakfast
__A vacation home/condo/cabin I rented
__In a campground

In accommodation with no charge
__At the home of family or friend
__ At my vacation home/condo/cabin
__ At a campground with no fee
__Other (what? _______________________)

10. What was the primary reason you chose this lodging (Check √ only 1)?

__Free parking __Hotel amenities __Hotel brand __Location
__Loyalty/reward program __Price __Special offer/package __Sustainable/green practices

Appendix D: Survey instrument, cont.

11. What best categorizes your group (Check √ 1)? ___Alone ___Couple/partner ___Family ___Friends ___Family & friends

12. Including yourself, how many people are in your immediate travel party? ___ #people in travel party

13. How many of your travel party are...

___#Younger than 12 years ___#12 to 17 years old ___#18 to 35 years old
___# 36 to 50 years old ___#51 to 69 years old ___#70+ years old

14. While on this trip, which of the following activities will members of your travel party participate in? (Check √ all that apply.)

General
__Dining out
__ Driving on designated byways
__ Guided tour
__ Nightlife/evening entertain
__ Sightseeing

Attending
__ Amateur/collegiate sport events
__Classical music concerts
__College tour/college visit
__Fairs or festivals
__Popular music concerts/shows
__Professional sporting events
__Youth sporting events

Participating in
__Biking
__Boating/sailing
__Boat cruise
__ Casino gaming
__Canoeing/kayaking
__ Fishing
__ Golfing
__ Hiking
__ Swimming/water sports
__ Wildlife viewing

Visiting
__Amusement parks/carnivals
__Art museums
__Other museums
__Friends/relatives
__Historic sites
__Spa
__Water parks
__Wineries/breweries
__Other attraction (What? ___________)

Shopping
__ Arts, crafts, antiques
__ General mall shopping
__ Gifts/souvenirs
__ Mall of America
__ Outlet shopping

15. During this trip, have you made any changes to your original plans because of other travelers' opinions, reviews, photos, videos, or other information that you found in social media websites?

__I have not changed my plans based on social media
__I did make a few changes to my plans
__I made significant changes to my plans

Finally, a few questions about you.

16. In what year were you born? 19___

17. What is your total annual household income, before taxes?

__Less than $50,000 __$50,000-$100,000 __$100,000+

18. Are you... __Male __ Female __Prefer not to answer

19. Are you currently a resident of:

__United States, Home zip code: _______________
__Canada, Home postal code: ___________________
__Other country, Please specify:__________________

For Administrative purposes only: WEEKDAY WEEKEND (Fri 12 pm-Sun)
Date: ___/___ Time: _____ am/pm Community:
Site type: 1 2 3 4 5 6 (1, Accommodations; 2, Attractions; 3, Events; 4, Retail; 5,Outdoor; 6, other)